

# **CLASSIFICATION MAINTENANCE STUDIES**

## **RECOMMENDED ACTIONS – CLASSIFICATION MAINTENANCE STUDIES**

5. Effective January 26, 2024, approve new classification specifications and adjust pay grades for Executive Secretary I (Title Code 0595CL) and Executive Secretary II (Title Code 0596CL).
6. Effective January 26, 2024, approve deletion of Secretary to County Administrative Officer (Title Code 0581CL) and direct Human Resources Services to remove the obsolete classification from all Orange County Classification Plan documents.
7. Effective January 26, 2024, approve revised classification specifications and adjust pay grades for IT Applications Developer I (Title Code 7989GE), IT Applications Developer II (Title Code 7990GE), and Senior IT Applications Developer (Title Code 7991SM).
8. Effective January 26, 2024, approve revised classification specifications and adjust pay grades for IT Database Administrator I (Title Code 7978GE), IT Database Administrator II (Title Code 7979GE), and Senior IT Database Administrator (Title Code 7981SM).
9. Effective January 26, 2024, approve revised classification specifications and adjust pay grades for Paralegal Trainee (Title Code 2302GE) and Paralegal (Title Code 2303GE); and approve and adopt new title description, classification specification, and set pay grade for Senior Paralegal (Title Code 2304GE).
10. Effective January 26, 2024, approve revised title code for the Real Estate Analyst (Title Code 8282MA), approve new title description, classification specification, and set pay grade for Real Estate Administrator (Title Code 8283MA); adjust pay grade for Real Estate Manager (Title Code 8284MA); and approve revised classification specifications for all classes in the Real Estate Management series.
11. Approve deletion of Real Estate Analyst (Title Code 8282MA) and direct Human Resource Services to remove the obsolete classification from all Orange County Classification Plan documents after all budgeted positions have been reallocated.
12. Effective January 26, 2024, approve revised classification specifications and adjust pay grades for Secretary I (Title Code 0579CL), Secretary II (Title Code 0578CL), and Secretary III (Title Code 0580CL).
13. Effective January 26, 2024, approve pay grade adjustments to the Association of County Law Enforcement Managers (ACLEM) salary schedule, included as Attachment E.

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14. Effective January 26, 2024, approve and adopt the attached Side Letter Agreement between the County of Orange and the Orange County Managers Association, included as Attachment F.

## **BACKGROUND INFORMATION:**

With Board approval of the current Memoranda of Understanding between the Association of County Law Enforcement Managers (ACLEM), Orange County Employees Association (OCEA), Orange County Managers Association (OCMA), and the County of Orange, along with requests by County departments, Human Resource Services (HRS) conducted multiple classification maintenance studies. Included for Board consideration and approval are a variety of recommendations impacting the pay ranges, recruiting steps, title codes, title descriptions, and/or class specifications for the Executive Secretary series, IT Application Development series, IT Database Administrator series, Paralegal series, Real Estate Management series, and Secretary series, along with pay grade adjustment to the ACLEM salary schedule and amendment to the OCMA Memorandum of Understanding.

The goal of the maintenance studies was to update the classification specifications, review the organizational structure of the occupational series, and evaluate the current salaries in relation to comparable public employer organizations. The maintenance study ensures that the job descriptions, working conditions, and minimum qualifications are accurate, and compensation is fair and competitive.

### **Maintenance Study Process**

The maintenance study process involves analysis to identify the need to create, modify, or delete classifications, update, or create job duties described in classification specifications, identify necessary changes to minimum qualifications, and delineate the physical, environmental, and mental characteristics of a classification. HRS reviews comparable classification specifications from local jurisdictions and collaborates with department management, subject matter experts, and labor organizations to review and update existing classification specifications. Changes to classification specifications ensure that: the duties and levels of responsibility are current; the classification occupational series have the appropriate structure to meet departmental workload demands in an efficient manner; and minimum qualifications are at an appropriate level to attract candidates with the necessary skills, knowledge, and abilities to perform the expected duties.

The market salary study and analysis consist of identifying comparators from surrounding public agencies to determine if current salaries are consistent with market salary averages. If it is determined that the minimum salary of a proposed pay grade is below the average within the market or is below the previously advertised minimum salary for the classification, an advanced recruiting step may be requested. HRS analyzes data from previous recruitments and internal employee separation reports and reviews current

staffing levels to determine if current salaries affect employee recruitment and retention. In addition to identifying comparable salaries, comparators’ current labor agreements are reviewed to identify and consider additional premium pay, allowances, and future negotiated salary adjustments offered by comparators.

**Executive Secretary Series**

Executive Secretaries perform complex, confidential, and highly responsible secretarial and administrative duties in support of Agency Department Heads, Elected Officials, the County Executive Officer, County Executive Office Chiefs, and County Counsel. Positions are assigned throughout the County.

HRS conducted a market salary survey and determined that the pay range for the Executive Secretary I classification is 9.75% below the market average. The following table displays a comparison of salaries from surrounding public sector organizations for classifications equivalent to Executive Secretary I:

<b>Organization</b>	<b>Title Description</b>	<b>Maximum Monthly Pay</b>
County of Los Angeles	Senior Management Secretary V	\$9,106
County of Los Angeles	Senior Management Secretary IV	\$8,906
City of Irvine	Administrative Assistant III	\$8,245
City of Los Angeles	Administrative Secretary	\$7,433
City of Anaheim	Executive Secretary	\$7,004
City of Santa Ana	Executive Secretary	\$7,004
County of Riverside	Executive Assistant IV	\$6,846
County of Ventura	Management Assistant III – Confidential	\$6,681
County of Riverside	Executive Assistant III	\$6,475
County of San Bernardino	Executive Secretary II	\$6,214

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Organization	Title Description	Maximum Monthly Pay
County of San Diego	Administrative Secretary III	\$5,951
City of San Diego	Executive Assistant	\$5,830
	<b>Average Monthly Maximum</b>	<b>\$7,141</b>
<b>County of Orange</b>	<b>Executive Secretary I</b>	<b>\$6,507</b>
	<b>Variance Below Market Average</b>	<b>9.75%</b>

Following an assessment of the external market data, internal salary equity analysis, turnover data, and assessment of the classification structure, HRS requests the deletion of the Secretary to County Administrative Officer and the approval to create classification specifications and adjust the Executive Secretary series pay grades as follows:

Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Range	Title Code	Title Description	Pay Grade & Monthly Range
0581CL	Secretary to County Administrative Officer	D3-48 \$4,489 - \$6,011	Delete Classification		
0595CL	Executive Secretary I	D3-51 \$4,857 - \$6,507	0595CL	Executive Secretary I	C-31 \$5,398 - \$7,277
0596CL	Executive Secretary II	D3-53 \$5,138 - \$6,869	0596CL	Executive Secretary II	C-34 \$5,855 - \$7,895

The following table provides a position summary following approval of the proposed classification changes:

Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count*	Title Description	
17	Executive Secretary I	17	Executive Secretary I	11.83%
13	Executive Secretary II	13	Executive Secretary II	14.94%
<b>30</b>	<b>Total</b>	<b>30</b>	<b>Total</b>	

\*Numbers expected to change slightly following position reallocations to resolve temporary fills and misallocations

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If all positions are filled, departments will attempt to absorb the approximate \$412,993 annual cost of implementing the proposed changes as follows:

<b>Classification Title</b>	<b>Approximate Annual Cost</b>	<b>Funding Source</b>	<b>Approximate Net County Cost</b>
Executive Secretary Series	\$412,993	*See Note	*Unspecified
<b>Total</b>	<b>\$412,993</b>		<b>*Unspecified</b>

\*Note: There are a total of 30 positions, within two classifications, assigned to 19 departments (Assessor, Auditor-Controller, Board of Supervisors, Child Support Services, Clerk of the Board, Clerk-Recorder, County Counsel, County Executive Office, Health Care Agency, John Wayne Airport, OC Community Resources, OC Public Works, OC Waste & Recycling, Office of Independent Review, Probation, Public Defender, OC Sheriff’s Department, Social Services Agency, and Treasurer-Tax Collector). Each department funding source(s) consists of a variety of baseline sources allocated from Net County Cost (NCC), Enterprise funds, Federal and State funds, and/or charge for services and vary from one to another. The percent breakdown of funding for each department unit(s) ranges from 100% NCC to 100% Enterprise funds, or a combination of sources thereof.

**IT Application Developer Series**

Positions in the IT Application Developer Series are assigned throughout the County. These classifications are responsible for the design, development, and maintenance of software applications, intranet, and internet websites, and perform professional-level applications maintenance and customer support duties to meet business needs.

HRS conducted a market salary survey and determined that the pay range for the IT Applications Developer II classification is 3.18% above the market average. The following table displays a comparison of salaries from surrounding public sector organizations for classifications equivalent to IT Applications Developer II (journey level):

<b>Organization</b>	<b>Title Description</b>	<b>Maximum Monthly Pay</b>
City of Los Angeles	Programmer/Analyst III	\$10,468
City of Santa Ana	Programmer Analyst	\$9,766
County of Los Angeles	Applications Developer II	\$9,495

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Organization	Title Description	Maximum Monthly Pay
County of Ventura	Information Systems Analyst	\$9,016
County of San Bernardino	Programmer II	\$8,174
County of Riverside	IT Applications Developer II	\$8,058
	<b>Average Monthly Maximum</b>	<b>\$9,163</b>
<b>County of Orange</b>	<b>IT Applications Developer II</b>	<b>\$9,464</b>
	<b>Variance Above Market Average</b>	<b>3.18%</b>

Based on external market findings, assessment of internal salaries, increased turnover, and recruitment/retention issues identified for the IT Applications Developer series, HRS requests approval to revise the classification specifications, and adjust the IT Applications Developer series pay grades as follows:

Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Range	Title Code	Title Description	Pay Grade & Monthly Range
7989GE	IT Applications Developer I	A3-62 \$6,308 - \$8,492	7989GE	IT Applications Developer I	C-38 \$6,531 - \$8,797
7990GE	IT Applications Developer II	A3-66 \$7,043 - \$9,464	7990GE	IT Applications Developer II	C-42 \$7,277 - \$9,802
7991SM	Senior IT Applications Developer	A3-72 \$8,270 - \$11,137	7991SM	Senior IT Applications Developer	C-47 \$8,334 - \$11,230

The following table provides a position summary following approval of the proposed changes:

Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count	Title Description	
1	IT Applications Developer I	1	IT Applications Developer I	3.59%
40	IT Applications Developer II	40	IT Applications Developer II	3.57%
43	Senior IT Applications Developer	43	Senior IT Applications Developer	0.84%
<b>84</b>	<b>Total</b>	<b>84</b>	<b>Total</b>	



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If all positions are filled, the departments will attempt to absorb the approximate \$285,014 annual cost of implementing the proposed changes as follows:

<b>Agency</b>	<b>Approximate Annual Cost</b>	<b>Funding Source</b>	<b>Approximate Net County Cost</b>
County Executive Office	\$149,407	100% - Fees/Charges	\$0
Health Care Agency	\$71,320	8% - NCC 10% - Federal 66% - State 16% - Fees/Charges	\$4,940
District Attorney	\$21,487	100% - NCC	\$21,487
Auditor-Controller	\$24,934	100% - NCC	\$24,934
Sheriff-Coroner	\$8,669	6.6% - NCC 0.7% - Federal 83% - State 0.7% - Fees/Charges 9% - Other	\$572
Registrar of Voters	\$4,466	100% - NCC	\$4,466
Assessors	\$3,154	100% - NCC	\$3,154
Clerk-Recorder	\$1,577	100% - Fees/Charges	\$1,577
<b>Total</b>	<b>\$285,014</b>	<b>Total</b>	<b>\$61,130</b>

**IT Database Administrator Series**

Positions in the IT Database Administrator series are assigned throughout the county. These classifications are responsible for the performance, integrity, and security of databases and database management systems to meet business needs.

HRS conducted a market salary survey and determined that the pay range for the IT Database Administrator II classification is 6.59% above the market average. The following table displays a comparison of salaries from surrounding public sector organizations for classifications equivalent to IT Database Administrator II (journey level):

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Organization	Title Description	Maximum Monthly Pay
County of San Bernardino	Systems Support Analyst II	\$9,240
County of Ventura	Data Systems Analyst	\$9,015
City of Anaheim	Systems Analyst	\$8,928
County of Riverside	IT Database Administrator II	\$8,675
City of Long Beach	Systems Support Specialist III	\$8,341
	<b>Average Monthly Maximum</b>	<b>\$8,840</b>
<b>County of Orange</b>	<b>IT Database Administrator II</b>	<b>\$9,464</b>
	<b>Variance Above Market Average</b>	<b>6.59%</b>

Based on external market findings and assessment of internal salaries for the IT Database Administrator series, HRS requests approval to revise the classification specifications, and adjust the IT Database Administrator series pay grades as follows:

Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Range	Title Code	Title Description	Pay Grade & Monthly Range
7978GE	IT Database Administrator I	A3-62 \$6,308 - \$8,492	7978GE	IT Database Administrator I	C-37 \$6,353 - \$8,561
7979GE	IT Database Administrator II	A3-66 \$7,043 - \$9,464	7979GE	IT Database Administrator II	C-41 \$7,081 - \$9,544
7981SM	Senior IT Database Administrator	A3-72 \$8,270 - \$11,137	7981SM	Senior IT Database Administrator	C-47 \$8,334 - \$11,230

The following table provides a position summary following approval of the proposed classification changes:

Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count	Title Description	
0	IT Database Administrator I	0	IT Database Administrator I	0.82%
7	IT Database Administrator II	7	IT Database Administrator II	0.84%

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Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count	Title Description	
3	Senior IT Database Administrator	3	Senior IT Database Administrator	0.84%
<b>10</b>	<b>Total</b>	<b>10</b>	<b>Total</b>	

If all positions are filled, the departments will attempt to absorb the approximate \$14,243 annual cost of implementing the proposed changes as follows:

Agency	Approximate Annual Cost	Funding Source	Approximate Net County Cost
County Executive Office	\$5,721	100% - Fees/Charges	\$0
Health Care Agency	\$5,368	8% - NCC 10% - Federal 66% - State 16% - Fees/Charges	\$429
District Attorney	\$1,577	100% - NCC	\$1,577
Public Defender	\$1,577	88% - NCC 12% - State	\$1,388
<b>Total</b>	<b>\$14,243</b>	<b>Total</b>	<b>\$3,394</b>

**Paralegal Series**

Positions in the Paralegal series are assigned to the offices of County Counsel, District Attorney, Public Defender, and Department of Child Support Services. These classifications are responsible for performing paraprofessional legal assistance at various levels from trainee to advanced-journey and are under the direction of and provide assistance to attorneys engaged in administrative, family, civil or criminal law.

HRS conducted a market salary survey and determined that the pay range for the Paralegal classification is 5.85% below the market average. The following table displays a comparison of salaries from surrounding public sector organizations for classifications equivalent to Paralegal (journey level):

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Organization	Title Description	Maximum Monthly Pay
City of Los Angeles	Paralegal I	\$8,568
City of San Diego	Paralegal	\$7,814
City of Anaheim	Paralegal	\$7,440
OC Superior Court	Paralegal	\$7,389
County of Los Angeles	Paralegal	\$7,293
County of San Diego	Paralegal II	\$7,289
City of Santa Ana	Paralegal (Excepted) UC	\$7,110
County of Riverside	Paralegal II	\$6,725
County of San Bernardino	Paralegal	\$6,439
County of Ventura	Paralegal	\$5,984
<b>Average Monthly Maximum</b>		<b>\$7,205</b>
<b>County of Orange</b>	<b>Paralegal</b>	<b>\$6,807</b>
<b>Variance Below Market Average</b>		<b>5.85%</b>

Based on market findings, and to assist with recruitment/retention, HRS requests approval to add a Senior Paralegal class, revise the classification specifications for Paralegal Trainee and Paralegal, and adjust the Paralegal series pay grades as follows:

Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Range	Title Code	Title Description	Pay Grade & Monthly Range
2302GE	Paralegal Trainee	A5-49 \$4,579 - \$6,133	2302GE	Paralegal Trainee	C-26 \$4,713 - \$6,353
2303GE	Paralegal	A5-53 \$5,496 - \$6,807	2303GE	Paralegal	C-32 \$5,697 - \$7,478
N/A			2304GE	Senior Paralegal	C-34 \$6,016 - \$7,895

The following table provides a position summary following approval of the proposed changes:

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Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count	Title Description	
0	Paralegal Trainee	0	Paralegal Trainee	3.59%
133	Paralegal	133	Paralegal	9.85%
	N/A	0	Senior Paralegal	N/A
<b>133</b>	<b>Total</b>	<b>133</b>	<b>Total</b>	

If all positions are filled, District Attorney, County Counsel, Public Defender, and CSS will attempt to absorb the approximate \$1,026,972 annual cost of implementing the proposed changes as follows:

Agency	Approximate Annual Cost	Funding Source	Approximate Net County Cost
District Attorney	\$693,108	19.5% - Grants 80.5% - NCC	\$557,813
Public Defender	\$159,724	100% NCC	\$159,724
CSS	\$32,324	66% Federal 34% State	\$0
County Counsel	\$65,363	66% - Billable (SSA/HCA) 34% - NCC	\$22,223
<b>Total</b>	<b>\$1,014,104</b>	<b>Total</b>	<b>\$739,760</b>

**Real Estate Management Series**

Positions in the Real Estate Management series are assigned to the CEO Real Estate Division, John Wayne Airport (JWA), Assessor, OC Sheriff’s Department (OCSD) and the District Attorney’s Office (DA). These classifications are responsible for the preparation, execution and/or oversight of real estate transactions including acquisition, leasing, development, sales and asset management of real property and lease management, concession management and revenue generation for the County of Orange.

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HRS conducted a market salary survey and determined that the pay range for the Real Estate Analyst classification is 17.26% above the market average. The following table displays a comparison of salaries from surrounding public sector organizations for classifications equivalent to Real Estate Analyst:

<b>Organization</b>	<b>Title Description</b>	<b>Maximum Monthly Pay</b>
County of Ventura	Senior Real Property Agent	\$8,714
County of San Diego	Senior Real Property Agent	\$8,587
County of San Bernardino	Real Property Agent III	\$8,441
City of Los Angeles	Real Estate Associate	\$8,397
County of Riverside	Senior Real Property Agent	\$8,174
	<b>Average Monthly Maximum</b>	<b>\$8,463</b>
<b>County of Orange</b>	<b>Real Estate Analyst</b>	<b>\$10,228</b>
	<b>Variance Above Market Average</b>	<b>17.26%</b>

Based on market findings, internal salary equity analysis, and assessment of the existing classification structure, HRS requests approval to revise the title code for the Real Estate Analyst; creating a new title description, class specification and set pay grade for the Real Estate Administrator classification; adjust pay grade for the Real Estate Manager; and approve revised class specifications for the Real Estate Management series as follows:

<b>Current</b>			<b>Proposed</b>		
<b>Title Code</b>	<b>Title Description</b>	<b>Pay Grade &amp; Monthly Range</b>	<b>Title Code</b>	<b>Title Description</b>	<b>Pay Grade &amp; Monthly Range</b>
8282MA	Real Estate Analyst	M-2 \$7,384 - \$10,228	Delete Classification		
	N/A		8283MA	Real Estate Administrator	M-3 \$8,124 - \$11,251
8284MA	Real Estate Manager	M-3 \$8,124 - \$11,251	8284MA	Real Estate Manager	M-4 \$8,935 - \$12,376
8285MA	Real Estate Manager, Senior	M-5 \$9,830 - \$13,614	8285MA	Real Estate Manager, Senior	M-5 \$9,830 - \$13,614
8286MA	Real Estate Deputy Director	M-7 \$11,894 - \$16,472	8286MA	Real Estate Deputy Director	M-7 \$11,894 - \$16,472

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The following table provides a position summary following approval of the proposed changes:

Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count	Title Description	
15	Real Estate Analyst	15	Real Estate Analyst	0.00%
N/A		0	Real Estate Administrator	N/A
5	Real Estate Manager	5	Real Estate Manager	10.00%
4	Real Estate Manager, Senior	4	Real Estate Manager, Senior	0.00%
3	Real Estate Deputy Director	3	Real Estate Deputy Director	0.00%
<b>27</b>	<b>Total</b>	<b>27</b>	<b>Total</b>	

Based on our findings, we are proposing the future deletion of the Real Estate Analyst classification and creation of a Real Estate Administrator level to address the need for a class that requires advanced journey-level analysis to perform the more complex real estate work and assignments. Through attrition as positions vacate, positions will be reallocated to the appropriate classification. The proposed future deletion will not have a negative impact on current employees and will eliminate the overlap in job function/duties with the Real Property Agent series and create a more appropriate career ladder from non-management to management and improve salary increase potential for those currently near the top of the advertised max and performance max of the current pay ranges.

If approved, those currently allocated to Real Estate Manager will move to pay grade M-4 and applicable departments will identify and determine if any current employees should be reallocated to the new Real Estate Administrator class. There are no initial costs associated with implementing the proposed changes.

**Secretary Series**

Secretaries provide secretarial and administrative support to one or more members of mid-level management, senior management, and executive leadership, relieving them of a variety of administrative duties, and non-routine work. Positions are assigned throughout the County.

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HRS conducted a market salary survey and determined that the pay range for the Secretary II classification is 7.05% below the market average. The following table displays a comparison of salaries from surrounding public sector organizations for classifications equivalent to Secretary II (journey-level):

<b>Organization</b>	<b>Title Description</b>	<b>Maximum Monthly Pay</b>
City of Anaheim	Secretary	\$6,091
City of Santa Ana	Secretary	\$6,082
County of Riverside	Executive Assistant II	\$5,845
City of Long Beach	Secretary	\$5,777
County of Los Angeles	Secretary III	\$5,588
County of Ventura	Management Assistant II	\$5,080
County of San Diego	Administrative Secretary II	\$4,983
County of San Bernardino	Secretary II	\$4,924
	<b>Average Monthly Maximum</b>	<b>\$5,546</b>
<b>County of Orange</b>	<b>Secretary II</b>	<b>\$5,181</b>
	<b>Variance Below Market Average</b>	<b>7.05%</b>

Following an assessment of the external market data, internal salary equity analysis, turnover data, and assessment of the classification structure, HRS requests approval to revise the classification specifications and adjust the Secretary series pay grades as follows:

<b>Current</b>			<b>Proposed</b>		
<b>Title Code</b>	<b>Title Description</b>	<b>Pay Grade &amp; Monthly Range</b>	<b>Title Code</b>	<b>Title Description</b>	<b>Pay Grade &amp; Monthly Range</b>
0579CL	Secretary I	D2-40 \$3,973 - \$4,787 (Recruiting Step 5)	0579CL	Secretary I	C-19 \$4,009 - \$5,257 (Recruiting Step 2)
0578CL	Secretary II	D2-43 \$3,886 - \$5,181	0578CL	Secretary II	C-23 \$4,345 - \$5,855
0580CL	Secretary III	D2-47 \$4,316 - \$5,765	0580CL	Secretary III	C-27 \$4,845 - \$6,531



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The following table provides a position summary following approval of the proposed classification changes:

Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count*	Title Description	
33	Secretary I	33	Secretary I	9.81%
40	Secretary II	40	Secretary II	13.01%
21	Secretary III	21	Secretary III	13.29%
<b>94</b>	<b>Total</b>	<b>94</b>	<b>Total</b>	

\*Numbers expected to change slightly following position reallocations to resolve temporary fills and misallocations

If all positions are filled, the departments below will attempt to absorb the approximate \$855,373 annual cost of implementing the proposed changes as follows:

Classification Title	Approximate Annual Cost	Funding Source	Approximate Net County Cost
Secretary Series	\$855,373	*See Note	*Unspecified
<b>Total</b>	<b>\$855,373</b>		<b>*Unspecified</b>

\*Note: There are a total of 94 positions, within three classifications, assigned to 12 departments (Assessor, Board of Supervisors, Child Support Services, County Executive Office, District Attorney’s Office, Health Care Agency, OC Community Resources, OC Public Works, Probation, OC Sheriff’s Department, Social Services Agency, and Treasurer-Tax Collector). Each department funding source(s) consists of a variety of baseline sources allocated from Net County Cost (NCC), Enterprise funds, Federal and State funds, and/or charge for services and vary from one to another. The percent breakdown of funding for each department unit(s) ranges from 100% NCC to 100% Enterprise funds, or a combination of sources thereof.

**ACLEM Salary Differential**

Human Resource Services (HRS) completed a review of the Association of County Law Enforcement Managers (ACLEM) salary schedule following the approval of base pay increases and POST pay adjustments for the Supervising Peace Officer Unit represented by the Association of Orange County Deputy Sheriffs (AOCDS) and the Law Enforcement Management Unit which is represented by ACLEM. As a result, HRS is proposing revisions to the salary schedule to ensure ACLEM salaries maintain the established pay differentials with the highest paid AOCDS subordinate classification.

**OCMA MOU Amendment**

Human Resource Services (HRS) completed a review of the Orange County Managers Association (OCMA) Memorandum of Understanding (MOU) following the implementation of the new administrative management class structure. As a result, HRS is proposing revisions to make necessary changes due to the conversion from a broad band salary range and class structure as well as the implementation of a merit increase plan.



## EXECUTIVE SECRETARY I

Bargaining Unit: CL Office Services

Class Code:  
0595CL

COUNTY OF ORANGE

Established Date: 01/26/2024

Revision Date:

### DEFINITION:

This position serves as an Executive Secretary to an Agency Department Head or an Appointed Department Head. Perform complex, confidential, and highly responsible secretarial and administrative duties in support of the day-to-day operations of the department; to interpret policy and administrative regulations; and to do other work as required.

### The Executive Secretary series includes the following:

Executive Secretary I (0595CL)

Executive Secretary II (0596CL)

### CLASS CHARACTERISTICS:

All classes in the Executive Secretary series perform duties composed of similar secretarial and administrative activities. The level of Executive Secretary allocated is directly related to the level of the Department Head served. This class differs from the Secretary III by the latter's support to members of Executive Management.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Acts as a liaison between the Department Head, their executive team and County officials, department managers and other County staff, visitors and the public; may act for manager as authorized in absence.
2. Screens and prioritizes telephone calls and office visitors which may require answering a variety of questions with considerable tact and judgment; maintains daily calendars and arranges schedule of appointments for the manager exercising considerable discretion in committing the manager's time or referring caller to another appropriate source of information or service; places outgoing calls for the managers; makes travel arrangements for supervisor and their staff.
3. Reviews and assesses incoming correspondence routed to the department head served; arranges correspondence for Manager's reply in order of priority, with appropriate background material attached

for reference; refers correspondence to subordinate staff member for reply and may follow up to ensure that workflow and deadlines are met.

4. Handles confidential information regarding personnel, controversial matters, and those of sensitive political nature; based on a thorough knowledge of activities and policies, may take responsibility for releasing information to authorized parties, attorneys, and newspaper reporters.
5. Serves as secretary to departmental management meetings, committees or public advisory groups; arranges for and sends out notices for meetings, attaching documents, and arranges luncheons; confirms attendance of members; prepares agendas from notes received from several sources; makes copies, scan and distributes document; attends meetings and keeps a general record of the activity including some verbatim reports; types minutes for Department Head approval, sending out copies for members, the press, and other interested parties.
6. Researches, compiles and consolidates data and information for assigned special projects and reports. Contacts other departments, employees, agencies, and individuals for additional material as necessary; may prepare reports for Manager's approval on request.
7. Composes and edits correspondence, emails, rough drafts, departmental policies and procedures, memos, reports, letters, PowerPoint presentations, reports, transcripts of minutes, and board or committee agendas and minutes; determines priority of matters for manager and executive team's signature or approval.
8. Maintains informational and operational records; prepares statistical or other types of reports in accordance with predetermined forms, policies and procedures; screen reports for completeness and arithmetical accuracy; lists, abstracts or summarizes data.
9. Coordinates and hosts various engagements, activities, and special events in-person and virtually, as assigned.
10. Maintains a variety of electronic and hard files, record management systems, and records of information pertinent to the administration of the department such as payroll, attendance, reports, and invoices.
11. Relieves Manager of routine personnel, budget, or other operating details, such as scheduling, timekeeping and approving material and purchase requisitions.
12. May assist with workflow submittal of agenda items for department to the Board of Supervisors and preparing timelines for Department Head of agenda deadlines.
13. May take and transcribe dictation from managers, notes, or recordings.
14. May review, assign, and supervise the work of office services staff.
15. May act as backup to Executive Secretary II.

#### **MINIMUM QUALIFICATIONS:**

##### **Thorough Knowledge of**

- Principles of writing and grammar, including correct English usage, spelling and proper word usage, vocabulary, punctuation, and sentence structure
- Modern office methods, business correspondence, receptionist techniques, reporting writing, maintain digital files, archive as appropriate per records retention schedules, and the operation of office equipment
- Overall County and Department/division organization structure and responsibilities
- The functions and basic office services operations of an administrative office
- Confidentiality principles and working with sensitive information
- General computer software such as Microsoft Office Suite applications, Adobe Acrobat Pro, DocuSign, Zoom, etc.
- Office technology and operational specific business systems, equipment, and applications relevant to area of assignment
- Telephone and email etiquette
- Basic principles of mathematics

### **Ability to**

- Interpret and apply administrative policies and procedures, manuals, computer software manuals, guidelines and non-routine correspondences
- Manage calendar(s), schedule meetings and conferences, coordinate with all parties, and make travel arrangements through multiple channels
- Plan, organize and complete assigned tasks despite frequent interruptions and/or distractions
- Exercise judgment to mediate conflicts, to persuade, and to train others, including the ability to act in a lead worker capacity
- Compose correspondence independently based on policy and guidelines
- Proofread written materials to identify errors in punctuation, spelling and grammar Work independently and complete assigned tasks with minimal supervision and direction
- Plan, organize, coordinate and supervise the work of others as required
- Communicate orally and in writing with County personnel, Board of supervisors, elected officials, attorneys, visitors, and the general public
- Take and transcribe notes for long periods of time or when multiple people are speaking, such as at meetings or conferences

- Stay up to date with computer software applications
- Meet high level officials and the public in situations requiring tact, diplomacy and poise
- Type at a corrected rate of 45 words per minute from clear copy
- Take dictation at a corrected rate of 85 words per minute and accurately transcribe it into final form, may be required for some positions

### ***Education and Experience***

Two (2) years experience as a Secretary III.

### ***Or***

Five (5) years of highly responsible secretarial/office services experience which would demonstrate possession of knowledge and abilities at the required level of skill and judgment.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

This is an "at-will" position. Incumbents in this position will serve at the discretion of the Department Head and can be terminated at any time. In such an event, the candidate has no right to any appeal or grievance procedure under any rule or regulation of the County or State.

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

### ***Environmental and Working Conditions***

Possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability

to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



## EXECUTIVE SECRETARY II

Bargaining Unit: CL Office Services

Class Code:  
0596CL

COUNTY OF ORANGE

Established Date: 01/26/2024

Revision Date:

### DEFINITION:

This position serves as an Executive Secretary to an Elected Official, County Executive Officer, County Executive Office Chiefs, and County Counsel. Perform highly complex, confidential, and responsible secretarial and administrative duties in support of the day-to-day operations of the department; to interpret policy and administrative regulations; and to do other work as required.

### The Executive Secretary II series includes the following:

Executive Secretary I (0595CL)

Executive Secretary II (0596CL)

### CLASS CHARACTERISTICS:

All classes in the Executive Secretary series perform duties composed of similar secretarial and administrative activities. The level of Executive Secretary allocated is directly related to the level of the Manager or Official served. This class differs from the Executive Secretary I by the direct confidential support of an Elected Official, County Executive Officer, County Executive Office Chiefs, and County Counsel.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Handles confidential information regarding personnel issues, controversial matters, and of highly sensitive political nature; based on a thorough knowledge of activities and policies, may take responsibility for releasing information to authorized parties, attorneys and newspaper reporters.
2. Acts as a liaison between Elected Official, County Executive Officer and County officials, department managers and other County staff, visitors and the public; may act for manager as authorized in absence.
3. Screens and prioritizes telephone calls and office visitors which may require answering a variety of questions with considerable tact and judgment; maintains daily calendars and arranges schedule of appointments for the manager exercising considerable discretion in committing the manager's time or referring caller to another appropriate source of information or service; places outgoing calls for the managers; makes travel arrangements for supervisor and their staff.



4. Reviews and assesses incoming correspondence routed to the official served; arranges correspondence for Manager's reply in order of priority, with appropriate background material attached for reference; refers correspondence to subordinate staff member for reply and may follow up to ensure that workflow and deadlines are met.
5. Serves as secretary to departmental management meetings, committees or public advisory groups; arranges for and sends out notices for meetings, attaching documents, and arranges luncheons; confirms attendance of members; prepares agendas from notes received from several sources; makes copies, scans and distributes documents; attends meetings and keeps a general record of the activity including some verbatim reports; types minutes for Elected Official or Department Head approval, sending out copies for members, the press, and other interested parties.
6. Researches, compiles and consolidates data and highly confidential information for assigned special projects and reports. Contacts other departments, employees, agencies and individuals for additional material as necessary; may prepare reports for Manager's approval on request.
7. Composes and edits correspondence, emails, rough drafts, departmental policies and procedures, memos, reports, letters, PowerPoint presentations, reports, transcripts of minutes, and board or committee agendas and minutes; determines priority of matters for manager's signature or approval.
8. Maintains informational and operational records; prepares statistical or other types of reports in accordance with predetermined forms, policies and procedures; screen reports for completeness and arithmetical accuracy; lists, abstracts or summarizes data.
9. Coordinates and hosts various engagements, activities, and special events in-person and virtually, as assigned.
10. Relieves Manager of routine personnel, budget or other operating details, such as scheduling, timekeeping and approving material and purchase requisitions.
11. Maintains a variety of electronic and hard files, record management systems, and records of information pertinent to the administration of the department such as payroll, attendance, reports, and invoices.
12. May assist with workflow submittal of agenda items for department to the Board of Supervisors and preparing timelines for Elected Official or County Executive Officer of agenda deadlines.
13. May take and transcribe dictation from managers, notes, or recordings.
14. May review, assign, and supervise the work of office services staff.
15. May act as backup to Executive Assistant.

#### **MINIMUM QUALIFICATIONS:**

##### **Thorough Knowledge of**

- Principles of writing and grammar, correct English usage, spelling and proper word usage, vocabulary, punctuation, and sentence structure

- Modern office methods, business correspondence, receptionist techniques, reporting writing, maintain digital files, archive as appropriate per records retention schedules, and the operation of office equipment
- Overall County and Department/division organization structure and responsibilities
- The functions and basic office services operations of an administrative office
- Confidentiality principles and working with highly sensitive information
- General computer software such as Microsoft Office Suite applications, Adobe Acrobat Pro, DocuSign, Zoom, etc.
- Office technology and operational specific business systems, equipment, and applications relevant to area of assignment
- Telephone and email etiquette
- Basic principles of mathematics

#### **Ability to**

- Interpret and apply administrative policies and procedures, manuals, computer software manuals, guidelines and non-routine correspondences
- Manage calendar(s), schedule meetings and conferences, coordinate with all parties, and make travel arrangements through multiple channels
- Plan, organize and complete assigned tasks despite frequent interruptions and/or distractions
- Exercise judgment to mediate conflicts, to persuade, and to train others, including the ability to act in a lead worker capacity
- Work independently and complete assigned tasks with minimal supervision and direction
- Compose correspondence independently based on policy and guidelines
- Proofread written materials to identify errors in punctuation, spelling and grammar
- Plan, organize, coordinate and supervise the work of others as required
- Communicate orally and in writing with County personnel, Board of supervisors, and other elected officials, attorneys, visitors, and the general public
- Take and transcribe notes for long periods of time or when multiple people are speaking, such as at meetings or conferences
- Stay up to date with computer software applications

- Meet high level officials and the public in situations requiring tact, diplomacy and poise
- Type at a corrected rate of 45 words per minute from clear copy
- Take dictation at a corrected rate of 85 words per minute and accurately transcribe it into final form may be required for some positions

### ***Education and Experience***

One (1) year experience as an Executive Secretary I.

### ***Or***

Six (6) years of highly responsible secretarial/office services experience which would demonstrate possession of knowledge and abilities at the required level of skill and judgment.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

This is an "at-will" position. Incumbents in this position will serve at the discretion of the Elected Official or Department Head and can be terminated at any time. In such an event, the candidate has no right to any appeal or grievance procedure under any rule or regulation of the County or State.

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

### ***Environmental and Working Conditions***

Possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving

conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



**INFORMATION TECHNOLOGY APPLICATIONS  
DEVELOPER I**

Bargaining Unit: GE General

Class Code:  
7989GE

COUNTY OF ORANGE

Established Date: 04/01/2011

Revision Date: 01/26/2024

**DEFINITION:**

Under direct supervision, performs professional duties of average difficulty and complexity pertaining to the design, development and maintenance of computer software solutions to meet business needs; analyzes, designs and develops application structures and coding; participates in application deployments; performs professional-level applications maintenance and customer support duties; analyzes, designs, develops, tests, documents and implements Intranet and Internet websites; may serve as a project lead over routine technology projects that are small in size and scope, and require limited staff and resources; and performs other related duties as assigned.

**The Information Technology Applications Developer series includes the following:**

Information Technology Applications Developer I (7989GE)

Information Technology Applications Developer II (7990GE)

Senior Information Technology Applications Developer (7991SM)

**CLASS CHARACTERISTICS:**

This is the entry-level class in the professional IT Applications Developer series. Positions in this class are distinguished from IT Applications Developer II by the performance of less than the full range of duties assigned to the IT Applications Developer II level. Incumbents work initially under general supervision while learning job tasks, progressing to reduced direction as the procedures and processes of the assigned areas of responsibilities are learned.

**EXAMPLES OF DUTIES:**

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Communicates with application users as well as other technology staff in order to analyze and define application requirements; designs and writes computer applications using various computer languages and/or database platforms; writes, revises and maintains code for application development, enhancement or modification using programming logic, scripts and documentation.

2. Writes application design specifications and documentation based on flow diagrams, schematics, file structures, reports, forms and menus to meet the desired output and performance requirements.
3. Designs and executes application testing plans to validate functionality; tests, troubleshoots and debugs programs using appropriate technology tools; resolves programming issues; refines data and formats final products.
4. Coordinates design, development, implementation and testing processes with other technology staff to implement application design specifications.
5. Designs, develops, implements and maintains websites, including a variety of scripting, navigation, search, content management, graphics design, user interfaces, security and audio/visual streaming.
6. Monitors and analyzes website/system volume capacities; monitors and analyzes traffic patterns; monitors and tests website functionality to ensure optimal performance for end users; implements performance improvements and/or site expansion.
7. Customizes third-party off-the-shelf software to meet County needs and standards.
8. Coordinates program and/or system development activities with vendors as required; maintains effective communications with users regarding vendor activities, problems, status, timelines and other details.
9. Provides professional support and troubleshooting assistance to customers pertaining to applications-related matters; investigates, troubleshoots, evaluates and resolves application function problems.
10. Develops secured and scalable application framework that align with County policies and procedures.
11. Performs other related duties as assigned.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Information technology hardware and software similar to that used by the hiring department
- Principles, methods and techniques used in designing, developing, and testing business applications and websites
- The application development lifecycle and design principles using flowcharting techniques and prototype development tools
- Current industry standard application and web development languages and technologies used in the Department
- Agile principles using team collaboration frameworks and tools
- Current industry standard version control systems and technologies

- General operational characteristics of local and wide area network systems
- Principles and practices of customer service in an information technology environment
- Basic project management principles and techniques such as organizing and managing a project, developing schedules, identifying critical paths, and breaking down a project into individual tasks
- Methods and techniques of developing and presenting technical documentation and training materials

**Ability to**

- Perform professional level applications development duties, including programming, maintaining, troubleshooting and repairing various application structures and websites
- Gather and evaluate information in order to reason logically, draw valid conclusions, take appropriate actions and/or make appropriate recommendations
- Develop, maintain, test and troubleshoot program structures, flow charts, layouts and screens using standard technologies and tools
- Read and interpret source code from commonly used programming languages; develop a working knowledge of new programming languages
- Communicate technical information to a wide variety of users
- Troubleshoot and repair a variety of application issues using appropriate testing methods and tools
- Plan, organize, prioritize and process work to ensure that deadlines are met
- Adapt quickly to changes in policies, procedures, assignments and work locations
- Communicate effectively, both verbally and in writing
- Establish and maintain effective working relationships with those encountered during the course of the work

***Education and Experience***

Two (2) years of directly related experience that demonstrates the competencies and attributes listed above;

***Or***

Possession of a bachelor's degree from an accredited college or university with major coursework in computer science, information systems or a closely related field that has provided the candidate with a sound conceptual understanding of information technology concepts.

***License/Certification***

Depending upon assignment, some positions in this class may require possession of a valid California driver's license, Class C or higher.

### ***Special Requirements***

Depending upon assignment, demonstrated professional level competency and/or certification pertaining to the information technologies used by the County may be required.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Frequent standing or sitting for extended periods; frequent walking; occasional driving may be required, depending upon assignment; occasional pushing/pulling; occasional bending, kneeling, squatting and crawling; occasional lifting up to 25 pounds; infrequent lifting up to 50 pounds; constant use of good overall vision for reading/close up work; infrequent use of color perception and occasional use of eye/hand coordination; frequent repetitive motion from writing and using a computer keyboard; occasional grasping, holding and reaching; frequent hearing/talking to others on the telephone and in person; frequent decision making and concentration; occasional public contact; occasional working alone.

Additional physical/mental requirements or frequencies may be required, depending upon assignment.

### ***Environmental and Working Conditions***

Work is typically performed in an indoor office environment, but occasionally requires travel to other locations. Work environments may include high levels of noise, dust and/or unpleasant odors.





## INFORMATION TECHNOLOGY APPLICATIONS DEVELOPER II

Bargaining Unit: GE General

Class Code:  
7990GE

COUNTY OF ORANGE

Established Date: 04/01/2011

Revision Date: 01/26/2024

### DEFINITION:

Under general supervision, performs professional duties of above average difficulty and complexity pertaining to the design, development and maintenance of computer software solutions to meet business needs; analyzes, designs and develops application structures and coding; participates in application deployments and implementation support; performs professional-level applications maintenance and customer support duties; analyzes, designs, develops, tests, documents and implements Intranet and Internet websites; may serve as a project lead over technology projects that are small or medium in size and scope, and require limited staff and resources; performs other related duties as assigned.

### The Information Technology Applications Developer series includes the following:

Information Technology Applications Developer I (7989GE)

Information Technology Applications Developer II (7990GE)

Senior Information Technology Applications Developer (7991SM)

### CLASS CHARACTERISTICS:

This is the journey-level class in the IT Applications Developer series. Positions in this class are distinguished from IT Applications Developer I by the performance of the full range of duties, which may include serving as a project lead over small to medium-sized technology projects. Incumbents at this level work under minimal direction, receiving occasional supervision while working toward a definite objective that requires use of a wide range of procedures and involves planning and/or determining specific scope and requirements in order to meet assigned objectives and solve business problems.

This class is distinguished from the class of Senior IT Applications Developer because incumbents in that class may perform supervisory and/or advanced professional duties that include coordinating, administering or managing projects that are larger in size and scope, requiring the support of multiple staff and/or the procurement/utilization of significant resources.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Communicates with application users as well as other technology staff in order to analyze and define application requirements; designs and writes computer applications using various computer languages and/or database platforms; writes, revises and maintains code for application development, enhancement or modification using programming logic, scripts and documentation.
2. Writes application design specifications and documentation based on flow diagrams, schematics, file structures, reports, forms and menus to meet the desired output and performance requirements.
3. Designs and executes application testing plans to validate functionality; tests, troubleshoots and debugs programs using appropriate technology tools; resolves programming issues; refines data and formats final products.
4. Coordinates design, development, implementation and testing processes with other technology staff to implement application design specifications.
5. Designs, develops, implements and maintains websites, including a variety of scripting, navigation, search, content management, graphics design, user interfaces, security and audio/visual streaming.
6. Monitors and analyzes website/system volume capacities; monitors and analyzes traffic patterns; monitors and tests website functionality to ensure optimal performance for end users; implements performance improvements and/or site expansion.
7. Customizes third-party off-the-shelf software to meet County needs and standards.
8. Coordinates program and/or system development activities with vendors as required; maintains effective communications with users regarding vendor activities, problems, status, timelines and other details.
9. Provides professional support and troubleshooting assistance to customers pertaining to applications-related matters; investigates, troubleshoots, evaluates and resolves application function problems.
10. Conducts online, group and/or one-on-one training sessions with application users and/or technology staff in order to provide information on application functions; designs and prepares training materials.
11. Provides recommendations for improving hardware and/or software in order to accomplish business goals; recommends and/or implements system adjustments to maximize application performance.
12. May provide more advanced professional support for applications-related projects that are medium in size and scope. Helps develop and monitor project budgets and resources; assists in monitoring vendor performance to ensure compliance with County standards and specifications; interfaces with clients to define project scope and review project activities, recommendations and outcomes; works with other IT disciplines to ensure system integration; designs and implements project testing and quality assurance processes.
13. Develops scalable application frameworks that aligns with County policies and procedures.
14. Performs other related duties as assigned.

**MINIMUM QUALIFICATIONS:**

**Knowledge of**

- Information technology hardware and software similar to that used by the hiring department
- Principles, methods and techniques used in designing, developing, and testing business applications and websites
- The application development lifecycle and design principles using flowcharting techniques and prototype development tools
- Current industry standard application and web development languages and technologies used in the Department
- Agile principles using team collaboration frameworks and tools
- Current industry standard version control systems and technologies
- Methods and techniques of evaluating business requirements to provide technology solutions
- General operational characteristics of local and wide area network systems
- Principles and practices of customer service in an information technology environment
- Basic project management principles and techniques such as organizing and managing a project, developing schedules, identifying critical paths, and breaking down a project into individual tasks
- Methods and techniques of developing and presenting technical documentation and training materials

**Ability to**

- Perform professional level applications development duties, including programming, maintaining, troubleshooting and repairing various application structures and websites
- Gather and evaluate information in order to reason logically, draw valid conclusions, take appropriate actions and/or make appropriate recommendations
- Develop, maintain, test and troubleshoot program structures, flow charts, layouts and screens using standard technologies and tools
- Read and interpret source code from commonly used programming languages; develop a working knowledge of new programming languages
- Communicate technical information to a wide variety of users
- Troubleshoot and repair a variety of application issues using appropriate testing methods and tools
- Plan, organize, prioritize and process work to ensure that deadlines are met
- Adapt quickly to changes in policies, procedures, assignments and work locations

- Communicate effectively, both verbally and in writing
- Establish and maintain effective working relationships with those encountered during the course of the work

### ***Education and Experience***

Two (2) years of experience that is comparable to a County of Orange IT Applications Developer I.

### ***Or***

College level education or training directly related to the competencies and attributes required of the position may be substituted for up to one (1) year of the required experience at the rate of three semester units or the equivalent, equaling one (1) month of experience and one (1) hour of training equaling one (1) hour of experience. College level education or training beyond a bachelor's degree, which is directly related to the competencies and attributes required of the position, may be substituted for up to an additional year of required experience at the same rate identified above.

### ***License/Certification***

Depending upon assignment, some positions in this class may require possession of a valid California driver's license, Class C or higher.

### ***Special Requirements***

Depending upon assignment, demonstrated professional level competency and/or certification pertaining to the information technologies used by the County may be required.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Frequent standing or sitting for extended periods; frequent walking; occasional driving may be required, depending upon assignment; occasional pushing/pulling; occasional bending, kneeling, squatting and crawling; occasional lifting up to 25 pounds; infrequent lifting up to 50 pounds; constant use of good overall vision for reading/close up work; infrequent use of color perception and occasional use of eye/hand coordination; frequent repetitive motion from writing and using a computer keyboard; occasional grasping, holding and reaching; frequent hearing/talking to others on the telephone and in person; frequent decision making and concentration; occasional public contact; occasional working alone.

Additional physical/mental requirements or frequencies may be required, depending upon assignment.

### ***Environmental and Working Conditions***

Work is typically performed in an indoor office environment, but occasionally requires travel to other locations. Work environments may include high levels of noise, dust and/or unpleasant odors. Occasional early morning, evening, holiday and/or weekend work may be required.



## SENIOR INFORMATION TECHNOLOGY APPLICATIONS DEVELOPER

Bargaining Unit: SM Supervisory Management

Class Code:  
7991SM

COUNTY OF ORANGE

Established Date: 04/01/2011

Revision Date: 01/26/2024

### DEFINITION:

Under direction, performs advanced professional duties pertaining to the design, development and maintenance of software application solutions to meet business needs; may serve as a lead or supervisor with responsibility for assigning, directing and monitoring the work of subordinate professional staff; may serve as a project manager, with responsibility for managing large development or customization of commercial, off-the-shelf (COTS) projects; coordinates application deployments; may design, develop, test, document and implement Intranet and Internet websites; performs advanced professional level applications maintenance and customer support duties; performs other related duties as assigned.

### The Information Technology Applications Developer series includes the following:

Information Technology Applications Developer I (7989GE)

Information Technology Applications Developer II (7990GE)

Senior Information Technology Applications Developer (7991SM)

### CLASS CHARACTERISTICS:

This is the advanced journey-level class in the IT Applications Developer series. Incumbents at this level work under minimal direction, receiving occasional supervision while working toward a definite objective that requires use of a wide range of procedures and planning to meet and resolve complex problems.

This class is distinguished from the class of IT Applications Developer II by the performance of lead or supervisory worker and/or advanced professional duties.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Serves as a lead or supervisory worker over subordinate professional information technology staff within an assigned work unit; schedules and assigns work; distributes resources; provides direction and guidance regarding processes and procedures; monitors staff work and work products to help meet unit goals and objectives; may provide input or write employee performance reviews.

2. May serve as the project lead over applications development projects; develops and monitors project budgets and resources; monitors vendor performance to ensure compliance with county standards and specifications; interfaces with clients to define project scope and review project activities, recommendations and outcomes; coordinates the use of project resources based on project requirements; coordinates project testing and quality assurance processes.
3. Conducts extensive research and analysis to find new opportunities; performing software evaluations and risk assessments; identifying the strengths and weakness of existing processes; and developing solutions against problem areas.
4. Writes complex application design specifications and documentation using flow diagrams, schematics, file structures, reports, forms and menus.
5. Communicates with application users as well as other technology staff in order to define application development requirements; designs and writes complex computer programs using various computer languages and/or database platforms; writes, revises and maintains code for application development, enhancement or modification using programming logic, scripts and documentation; evaluates and resolves program relationship and system integration issues.
6. Coordinates design, development, implementation and testing processes with other technology staff to implement application design specifications and ensure integration across multiple platforms and technologies.
7. Designs, develops, implements, documents and maintains websites, including Information Architecture, navigation, searching, content management, graphics design, user interfaces, security and audio/visual streaming. Develops website navigation and application frameworks; writes programming code and scripts; creates database connections; ensures compliance of web pages and sites with County policies and procedures.
8. Implements website security to help ensure the integrity and protection of data and to prevent intrusion from external sources.
9. Performs various application quality assurance activities; tests, troubleshoots and de-bugs programs using appropriate technology; executes testing plans to validate functionality; resolves programming issues; refines data and formats final products.
10. Provides recommendations for improving hardware and/or software in order to accomplish business goals; recommends and/or implements operating system adjustments to maximize application performance and resource resolution.
11. Customizes purchased third-party software to meet County needs and standards.
12. Coordinates program and/or system development activities with vendors; maintains effective communications with users regarding vendor activities, problems, status, timelines and other details.
13. Provides professional support and troubleshooting assistance to customers pertaining to applications-related matters; investigates, troubleshoots, evaluates and resolves complex application function problems.

14. Conducts online, group and/or one-on-one training sessions with application users and/or technology staff in order to provide information on application functions; designs and prepares training materials.
15. Prepares reports, correspondence and other documents; participates on committees and task forces; attends meetings, conferences and training sessions.
16. Performs other related duties as assigned.

## **MINIMUM QUALIFICATIONS:**

### **Knowledge of**

- Principles of supervision, including how to train and motivate staff
- Project management principles and techniques including project budgeting, quality assessment and control and resource management
- Information technology hardware and software similar to that used by the hiring department
- General operations, services, concepts, terms and activities common to a comprehensive, state-of-the-art information technology program
- Advanced principles, methods and techniques used in designing, developing, testing, documenting and implementing business applications
- Advanced principles pertaining to the application development lifecycle; application design principles using flowcharting techniques and prototype development tools
- Current industry standard application and web development languages and technologies used in the Department
- Current industry standard graphical user interface development programs and tools used in the Department
- Methods and techniques of evaluating business requirements to provide technology solutions
- Operational characteristics of local and wide area network systems
- Operational characteristics of communication systems, equipment and devices
- Tools and equipment used in testing the functionality of computer applications
- Principles and practices of customer service in an information technology environment
- Methods and techniques of developing and presenting technical documentation and training materials

### **Ability to**

- Assign, direct, lead and supervise the work of others
- Coordinate and administer complex information technology projects; plan and schedule the work of assigned project team members to accomplish project goals
- Perform professional level applications development duties, including programming, maintaining, troubleshooting and repairing various application structures and websites, from inception to final testing and implementation
- Gather and evaluate information in order to reason logically, draw valid conclusions, take appropriate actions and/or make appropriate recommendations
- Develop, maintain, test and troubleshoot program structures, flow charts, layouts and screens using standard technologies and tools
- Read and interpret source code from commonly used programming languages; develop a working knowledge of new programming languages
- Communicate technical information to a wide variety of users
- Troubleshoot and repair a variety of complex and difficult application issues using appropriate program testing methods and tools
- Plan, organize, prioritize and process work to ensure that deadlines are met
- Interpret and apply complex and technical information pertaining to computer and network systems
- Adapt quickly to changes in policies, procedures, assignments and work locations
- Communicate effectively, both verbally and in writing
- Establish and maintain effective working relationships with those encountered during the course of the work

### ***Education and Experience***

Three (3) years performing applications development and analysis at a level that is comparable to the County of Orange class of IT Applications Developer II;

College level education or training directly related to the competencies and attributes required of the position may be substituted for up to one (1) year of the required experience at the rate of three (3) semester units or the equivalent, equaling one (1) month of experience and one (1) hour of training equaling one (1) hour of experience. College level education or training beyond a bachelor's degree, which is directly related to the competencies and attributes required of the position, may be substituted for up to an additional year of required experience at the same rate identified above.

### ***License/Certification***



Depending upon assignment, some positions in this class may require possession of a valid California driver's license, Class C or higher.

### ***Special Requirements***

Depending upon assignment, demonstrated professional level competency and/or certification pertaining to the information technologies used by the appointing department may be required.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Frequent standing or sitting for extended periods; frequent walking; occasional driving may be required, depending upon assignment; infrequent pushing/pulling; infrequent bending, kneeling, squatting and crawling; infrequent lifting up to 25 pounds; constant use of good overall vision for reading/close up work; infrequent use of color perception and occasional eye/hand coordination; frequent repetitive motion from writing and using a computer keyboard; occasional grasping, holding and reaching; frequent hearing/talking to others on the telephone and in person; frequent decision making and concentration; occasional public contact; occasional working alone.

Additional physical/mental requirements or frequencies may be required, depending upon assignment.

### ***Environmental and Working Conditions***

Work is typically performed in an indoor office environment, but occasionally requires travel to other locations. Work environments may include high levels of noise, dust and/or unpleasant odors. Occasional early morning, evening, holiday and/or weekend work may be required.



**INFORMATION TECHNOLOGY DATABASE  
ADMINISTRATOR I**

Bargaining Unit: GE General

Class Code:  
7978GE

COUNTY OF ORANGE

Established Date: 04/01/2011

Revision Date: 01/26/2024

**DEFINITION:**

Under direct supervision, performs professional duties of average difficulty and complexity that emphasize responsibility for the performance, integrity and security of one or more databases; administers, manages, designs, documents and evaluates a variety of database management systems; ensures that data remains consistent across the database(s) and that data is clearly defined; ensures that users can access the data concurrently in a form that meets business needs; ensures appropriate data security and disaster recovery; may serve as a project lead over routine technology projects that are small in size and scope, and require limited staff and resources; performs other related duties as assigned.

**The Information Technology Database Administrator series includes the following:**

Information Technology Database Administrator I (7978GE)

Information Technology Database Administrator II (7979GE)

Senior Information Technology Database Administrator II (7981SM)

**CLASS CHARACTERISTICS:**

This is the entry-level class in the IT Database Administration professional series. Positions in this class are distinguished from IT Database Administrator II by the performance of less than the full range of duties assigned to the IT Database Administrator II level. Incumbents work initially under general supervision while learning job tasks, progressing to reduced direction as the procedures and processes of the assigned areas of responsibilities are learned.

**EXAMPLES OF DUTIES:**

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Designs, analyzes, develops, maintains and administers database solutions; captures basic database and reporting requirements; plans, determines and implements database hardware/software configurations, taking into consideration both front end user accessibility and back-end organization needs.
2. Designs, develops, tests, deploys, and support ad-hoc and recurring reports and dashboards.

3. Refines database logical designs into specific data models.
4. Develops support programs as needed to transfer, extract, transform and load data into databases and extract and transfer data between databases.
5. Monitors and optimizes database performance. Writes scripts to support database monitoring and administration tasks.
6. Installs and tests new versions of database management systems; plans and implements upgrades; regularly tests hardware and software to ensure optimal functionality.
7. Controls user access permissions and privileges; identifies and resolves database security issues; provides recommendations to improve performance and security.
8. Ensures that database storage, archiving, backup and recovery procedures are functioning correctly; plans for capacity needs.
9. Researches and responds to customer complaints regarding database functionality; investigates, analyzes and resolves a wide variety of database-related problems; troubleshoots failures and makes corrections to ensure business continuity.
10. Writes database documentation, including data standards, procedures and definitions.
11. Prepares reports, correspondence and other documents; participates on committees and task forces; attends meetings, conferences and training sessions.
12. Performs other related duties as assigned.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Information technology operating systems, hardware, software, database components similar to those being used by the hiring department
- Principles, practices, standards, terminology, protocols, and trends in database engineering and administration
- The functions, features and benefits of database management platforms and associated structures
- Database design methods and techniques
- Best practice database design and software framework development
- Database security methods, procedures and best practices
- Applications development and support practices
- Database performance tuning

- Current industry standard database technology standards
- Techniques for defining logical relationships among data, processes and events
- Principles and practices of project management
- Principles and practices of customer service
- Methods and techniques of developing and presenting technical documentation and training materials

**Ability to**

- Analyze, develop, maintain and administer databases and database management systems similar to those being used by the hiring department
- Test and troubleshoot database performance problems and implement solutions to correct such problems
- Gather and document requirements, design, and build reporting solutions
- Respond appropriately to customer service requests
- Plan, design and implement new database systems
- Plan, organize, prioritize and process work to ensure that deadlines are met
- Read, understand and apply technical information pertaining to computer software and hardware
- Adapt quickly to changes in policies, procedures, assignments and work locations
- Communicate effectively both in orally and in writing for technical and non-technical audiences
- Establish and maintain effective working relationships with those encountered during the course of the work

***Education and Experience***

Two (2) years of directly related experience that demonstrates the competencies and attributes listed above;

***Or***

Possession of a bachelor's degree from an accredited college or university with major coursework in computer science, information systems or a closely related field that has provided the candidate with a sound conceptual understanding of information technology concepts.

***License/Certification***

Depending upon assignment, some positions in this class may require possession of a valid California driver's license, Class C or higher.

***Special Requirements***

Depending upon assignment, demonstrated professional level competency and/or certification pertaining to the information technologies used by the County may be required.

**PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS*****Physical and Mental Requirements***

Frequent standing or sitting for extended periods; frequent walking; occasional driving may be required, depending upon assignment; occasional pushing/pulling; occasional bending, kneeling, squatting and crawling; occasional lifting up to 25 pounds; infrequent lifting up to 50 pounds; constant use of good overall vision for reading/close up work; infrequent use of color perception and occasional use of eye/hand coordination; frequent repetitive motion from writing and using a computer keyboard; occasional grasping, holding and reaching; frequent hearing/talking to others on the telephone and in person; frequent decision making and concentration; occasional public contact; occasional working alone.

Additional physical/mental requirements or frequencies may be required, depending upon assignment.

***Environmental and Working Conditions***

Work is typically performed in an indoor office environment, but occasionally requires travel to other locations. Work environments may include high levels of noise, dust and/or unpleasant odors. Occasional early morning, evening, holiday and/or weekend work may be required.



**INFORMATION TECHNOLOGY DATABASE  
ADMINISTRATOR II**

Bargaining Unit: GE General

Class Code:  
7979GE

COUNTY OF ORANGE

Established Date: 04/01/2011

Revision Date: 01/26/2024

**DEFINITION:**

Under general supervision, performs professional duties of above average difficulty and complexity that emphasize responsibility for the performance, integrity and security of one or more databases; administers, manages, designs, documents and evaluates a variety of database management systems; ensures that data remains consistent across the database(s) and that data is clearly defined; ensures that users can access the data concurrently in a form that meets business needs; ensures appropriate data security and disaster recovery; may serve as a project lead over technology projects that are small or medium in size and scope, and require limited staff and resources; performs other related duties as assigned.

**The Information Technology Database Administrator series includes the following:**

Information Technology Database Administrator I (7978GE)

Information Technology Database Administrator II (7979GE)

Senior Information Technology Database Administrator II (7981SM)

**CLASS CHARACTERISTICS:**

This is the journey-level class in the IT Database Administrator series. Positions in this class are distinguished from IT Database Administrator I by the performance of the full range of duties, which may include serving as a project lead on routine projects. Incumbents receive occasional supervision while working toward a definite objective that requires use of a wide range of procedures and involves planning and/or determining specific procedures or equipment required in order to meet assigned objectives and solve more complex problems. Incumbents in this class may perform lead duties.

This class is distinguished from the class of Senior IT Database Administrator because incumbents in that class may perform supervisory and/or advanced professional duties that include coordinating, administering or managing projects that are large in size and scope, requiring the support of multiple staff and/or the procurement/utilization of significant resources.

**EXAMPLES OF DUTIES:**

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Designs, analyzes, develops, maintains and administers database solutions; captures database and reporting requirements; plans, determines and implements database hardware/software configurations, taking into consideration both front end user accessibility and back-end organization needs.
2. Designs, develops, tests, deploys, and support ad-hoc and recurring reports and dashboards.
3. Refines database logical designs into specific data models.
4. Develops support programs as needed to transfer, extract, transform and load data into databases and extract and transfer data between databases.
5. Monitors and optimizes database performance. Writes scripts to support database monitoring and administration tasks.
6. Installs and tests new versions of database management systems; plans and implements upgrades; regularly tests hardware and software to ensure optimal functionality.
7. Controls user access permissions and privileges; identifies and resolves database security issues; provides recommendations to improve performance and security.
8. Ensures that database storage, archiving, backup and recovery procedures are functioning correctly; plans for capacity needs.
9. Researches and responds to customer complaints regarding database functionality; investigates, analyzes and resolves a wide variety of database-related problems; troubleshoots failures and makes corrections to ensure business continuity.
10. Writes database documentation, including data standards, procedures and definitions.
11. Prepares reports, correspondence and other documents; participates on committees and task forces; attends meetings, conferences and training sessions.
12. Performs other related duties as assigned.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Information technology operating systems, hardware, software, database, and reporting components similar to those being used by the hiring department
- Principles, practices, standards, terminology, protocols, and trends in database engineering and administration
- The functions, features and benefits of database management platforms and associated structures
- Database design methods and techniques
- Best practice database design and software framework development

- Database security methods, procedures and best practices
- Applications development and support practices
- Database performance tuning
- Current industry standard database technology standards
- Techniques for defining logical relationships among data, processes and events
- Principles and practices of project management
- Principles and practices of customer service
- Methods and techniques of developing and presenting technical documentation and training materials

**Ability to**

- Analyze, develop, maintain and administer databases and database management systems similar to those being used by the hiring department
- Test and troubleshoot database performance problems and implement solutions to correct such problems
- Gather and document requirements and design and build reporting solutions
- Respond appropriately to customer service requests
- Plan, design and implement new database systems
- Plan, organize, prioritize and process work to ensure that deadlines are met
- Read, understand and apply technical information pertaining to computer software and hardware
- Adapt quickly to changes in policies, procedures, assignments and work locations
- Communicate effectively both in orally and in writing for technical and non-technical audiences
- Establish and maintain effective working relationships with those encountered during the course of the work

***Education and Experience***

Two (2) years of experience that is comparable to a County of Orange IT Database Administrator I;

College level education or training directly related to the competencies and attributes required of the position may be substituted for up to one (1) year of the required experience at the rate of three (3) semester units or



the equivalent, equaling one (1) month of experience and one (1) hour of training equaling one (1) hour of experience. College level training beyond a bachelor's degree, which is directly related to the competencies and attributes required of the position, may be substituted for up to an additional year of required experience at the same rate identified above.

### ***License/Certification***

Depending upon assignment, some positions in this class may require possession of a valid California driver's license, Class C or higher.

### ***Special Requirements***

Depending upon assignment, demonstrated professional level competency and/or certification pertaining to the information technologies used by the County may be required.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Frequent standing or sitting for extended periods; frequent walking; occasional driving may be required, depending upon assignment; occasional pushing/pulling; occasional bending, kneeling, squatting and crawling; occasional lifting up to 25 pounds; infrequent lifting up to 50 pounds; constant use of good overall vision for reading/close up work; infrequent use of color perception and occasional use of eye/hand coordination; frequent repetitive motion from writing and using a computer keyboard; occasional grasping, holding and reaching; frequent hearing/talking to others on the telephone and in person; frequent decision making and concentration; occasional public contact; occasional working alone.

Additional physical/mental requirements or frequencies may be required, depending upon assignment.

### ***Environmental and Working Conditions***

Work is typically performed in an indoor office environment, but occasionally requires travel to other locations. Work environments may include high levels of noise, dust and/or unpleasant odors. Occasional early morning, evening, holiday and/or weekend work may be required.



**SENIOR INFORMATION TECHNOLOGY DATABASE  
ADMINISTRATOR**

Bargaining Unit: SM Supervisory Management

Class Code:  
7981SM

COUNTY OF ORANGE

Established Date: 04/01/2011

Revision Date: 01/26/2024

**DEFINITION:**

Under general direction, performs advanced professional duties that emphasize responsibility for the performance, integrity and security of one or more databases; may serve as a lead or supervisor with responsibility for assigning, directing and monitoring the work of subordinate professional staff; manages database projects; administers, manages, designs, documents and evaluates a variety of database management systems; ensures that data remains consistent across the database(s) and that data is clearly defined; ensures that users can access the data concurrently in a form that meets business needs; ensures appropriate data security and disaster recovery; performs other related duties as assigned.

**The Information Technology Database Administrator series includes the following:**

Information Technology Database Administrator I (7978GE)

Information Technology Database Administrator II (7979GE)

Senior Information Technology Database Administrator II (7981SM)

**CLASS CHARACTERISTICS:**

Senior IT Database Administrator is the advanced journey-level class in the IT Database Administration series. Incumbents work under minimal direction, receiving occasional supervision while working toward a definite objective that requires use of a wide range of procedures and planning to resolve computer problems.

This class is distinguished from the class of IT Database Administrator II by its lead or supervisory and/or advanced professional duties.

**EXAMPLES OF DUTIES:**

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Serves as a lead or supervisor within an assigned work unit; schedules and assigns work; distributes resources; provides direction and guidance regarding processes and procedures; monitors staff work and work products to help meet unit goals and objectives; may provide input to supervisor(s) regarding employee performance or write employee performance evaluation.

2. Designs, analyzes, develops, maintains and administers database software solutions; captures basic database requirements; plans, determines and implements database hardware/software configurations, taking into consideration both front end user accessibility and back end organization needs; creates standard database menu formats; refines database logical designs into specific data models; refines physical designs to meet system storage requirements.
3. Serves as the administrator for one or more departmental databases; researches and identifies database environment requirements and specifications; determines integration requirements to ensure inter-operability across multiple platforms and technologies; coordinates with systems, applications, network and other staff to identify, plan and implement database design specifications and resolve integration issues.
4. May manage complex database development projects; develops and monitors project budgets and resources; monitors and manages vendor performance to ensure compliance with County standards and specifications; interfaces with clients to define project scope and review project activities, recommendations and outcomes; manages the use of project resources based on project specifications; designs and directs project testing and quality assurance processes.
5. Develops database programs as needed to transfer, extract, transform and load data into databases and extract and transfer data between databases.
6. Monitors database performance and manages various parameters; writes scripts to support database monitoring and administration tasks.
7. Installs and tests new versions of database management systems; plans and implements upgrades; regularly tests hardware and software to ensure optimal functionality.
8. Monitors database traffic, performance and security using a variety of evaluation tools; analyzes traffic patterns; checks logs to detect anomalies.
9. Controls user access permissions and privileges; identifies and resolves database security issues; provides recommendations to improve performance and security.
10. Ensures that database storage, archiving, backup and recovery procedures are functioning correctly; plans for capacity needs.
11. Researches and responds to customer complaints regarding database functionality; investigates, analyzes and resolves a wide variety of database-related problems; troubleshoots failures and makes corrections to ensure business continuity.
12. Writes database documentation, including data standards, procedures and definitions.
13. Prepares reports, correspondence and other documents; participates on committees and task forces; attends meetings, conferences and training sessions.
14. Performs other related duties as assigned.

**MINIMUM QUALIFICATIONS:****Knowledge of**

- Principles of lead supervision, including how to train and motivate staff
- Information technology operating systems and hardware and software components similar to those being used by the hiring department
- Principles and practices of project management
- Principles, practices, standards, terminology, protocols, and trends in database engineering and administration within large complex organizations
- Functions, features and benefits of database management platforms and associated structures; data migration considerations
- Database design methods and techniques
- Best practice database design patterns and software framework development
- Database security methods, procedures and best practices
- Applications development and support practices
- Methods of database performance tuning
- Techniques for defining logical relationships among data, processes or events
- Principles and methods of network and server administration
- Principles and practices of customer service
- Methods and techniques of developing and presenting technical documentation and training materials

### **Ability to**

- Assign, direct and lead the work of others
- Manage complex projects involving the planning, designing and implementation of new database software and systems
- Analyze, develop, maintain and administer moderately complex databases and database management systems similar to those being used by the hiring department
- Test and troubleshoot moderately difficult database performance problems and implement solutions to correct such problems
- Respond appropriately to customer service requests
- Plan, organize, prioritize and process work to ensure that deadlines are met
- Learn and utilize specialized terminology if needed by the specific assignment

- Read, understand and apply technical information pertaining to computer software and hardware
- Adapt quickly to changes in policies, procedures, assignments and work locations
- Communicate effectively both in orally and in writing for technical and non-technical audiences
- Establish and maintain effective working relationships with those encountered during the course of the work

### ***Education and Experience***

Three (3) years performing database administration at a level that is comparable to the County of Orange classification of IT Database Administrator II;

College level education or training directly related to the competencies and attributes required of the position may be substituted for up to one (1) year of the required experience at the rate of three (3) semester units or the equivalent, equaling one (1) month of experience and one (1) hour of training equaling one (1) hour of experience. College level education or training beyond a bachelor's degree, which is directly related to the competencies and attributes required of the position, may be substituted for up to an additional year of required experience at the same rate identified above.

### ***License/Certification***

Depending upon assignment, some positions in this class may require possession of a valid California driver's license, Class C or higher.

### ***Special Requirements***

Depending upon assignment, demonstrated professional level competency and/or certification pertaining to the information technologies used by the appointing department may be required.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Frequent standing or sitting for extended periods; frequent walking; occasional driving may be required, depending upon assignment; infrequent pushing/pulling; infrequent bending, kneeling, squatting and crawling; infrequent lifting up to 25 pounds; constant use of good overall vision for reading/close up work; infrequent use of color perception and occasional eye/hand coordination; frequent repetitive motion from writing and using a computer keyboard; occasional grasping, holding and reaching; frequent hearing/talking to others on the telephone and in person; frequent decision making and concentration; occasional public contact; occasional working alone.

Additional physical/mental requirements or frequencies may be required, depending upon assignment.

### ***Environmental and Working Conditions***

Work is typically performed in an indoor office environment, but occasionally requires travel to other locations. Work environments may include high levels of noise, dust and/or unpleasant odors. Occasional early morning, evening, holiday and/or weekend work may be required.



## PARALEGAL TRAINEE

Bargaining Unit: GE General

Class Code:  
2302GE

COUNTY OF ORANGE

Established Date: 08/27/1987

Revision Date: 01/26/2024

### DEFINITION:

Under direction, incumbents assist attorneys in the preparation of cases for trial and hearing matters, prepare exhibits and witnesses for trial, analyze existing information regarding the case at hand, research and interpret pertinent case law, and research and develop the content of legal documents.

### The Paralegal series includes the following:

Paralegal Trainee (2302GE)

Paralegal (2303GE)

Senior Paralegal (2304GE)

### CLASS CHARACTERISTICS:

Positions allocated to this series perform paraprofessional legal assistance at various levels from trainee to advanced journey. Incumbents are under the direction of and provide assistance to one or more attorneys engaged in administrative, family, civil, or criminal law in the offices of County Counsel, District Attorney, Public Defender, and Department of Child Support Services.

The Paralegal Trainee is the entry-level classification used to provide employees with the experience required for the journey-level classification in the Paralegal occupational series. Under the close direction of an experienced paralegal and an attorney, incumbents perform a wide variety of paralegal duties while learning job tasks, progressing as the procedures and processes of the assigned areas of responsibilities are learned. Positions are not budgeted at this level, and there is no permanent status in this class. Incumbents who do not promote to Paralegal at the end of the one-year probationary period will have failed probation.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Review, summarize, and respond to legal pleadings.

2. Request information from local, state, and federal law enforcement agencies, court, and penal institutions.
3. Process, analyze, and upload digital evidence for review.
4. Prepare discovery, which may include, but is not limited to, analyzing, indexing, redacting, numbering, and documenting.
5. Review and process requests for criminal record background information in order to determine the existence or non-existence of prior convictions.
6. Research and analyze law sources, such as statutes, ordinances, court decisions, criminal pleadings, police reports, legal documents, and articles for use in preparing legal documents such as briefs, pleadings, contracts, deeds, opinions, etc., for review, approval and use by an attorney.
7. Maintain and produce statistical reports.
8. Summarize, organize, and index prior opinions, testimony, depositions, and documentary material from investigations, interrogatories, and court proceedings.
9. Assist clients with placement in social services programs.
10. Analyze probate, guardianship, and conservatorship petitions for compliance with statutes, ordinance, and court orders; recommend granting petitions and correcting deficiencies; assist probate judge with preparation of court orders and contact civil attorneys regarding changes to petitions.
11. Direct preparation of subpoenas and assure witness compliance.
12. Coordinate pre-trial case preparation.
13. Attend court and direct preparation of court orders by office support staff.
14. Analyze elements of cases to identify questions.
15. Research authorities and pertinent cases on specific points of law.
16. Prepare points and authorities in support case.
17. Prepare legal documents by refining content and language of pleading, affidavits, declarations, motions, discovery, and other legal documents.
18. Locate and conduct interviews with parties and potential witnesses and advise attorneys of appropriate action based on the information obtained in the interviews.
19. Arrange and attend evidence examinations with attorneys, investigations and/or expert witnesses.
20. Assist attorneys in trials by formulating juror questionnaires, assisting with jury selection proceedings, and coordinating witness appearances at trials.



**MINIMUM QUALIFICATIONS:****General Knowledge of**

- Civil and/or criminal legal processes
- Principles, concepts, and methodology of legal research, discovery, and fact investigation
- Legal principles and practices
- Legal terminology
- Principles of legal writing
- Content and language requirements of legal documents
- Rules of evidence and the conduct of court proceeding
- Investigate interviewing techniques

**Ability to**

- Prioritize caseload to meet deadlines
- Extract and organize information from diverse, complex, and obscure sources
- Present statements of fact and law, and argue clearly and logically in written and oral form
- Establish and maintain effective working relationships with members of the legal profession, public officials, and the general public
- Effectively communicate with a variety of individuals representing diverse cultures and background and function calmly in stressful situations, which will require a high degree of sensitivity, tact, and diplomacy
- Produce clear and concise documents
- Interpret applicable state and federal codes, laws, and statutes
- Exercise appropriate judgment in answering questions and releasing information

***Experience***

One (1) year of experience in a law office performing paralegal duties that demonstrates possession of the knowledge and abilities listed as minimum qualifications relevant to the specific assignment.

***Or***

Three (3) years of legal office support experience, such as Attorney Clerk II, Senior Child Support Specialist, Investigate Assistant, and Senior Legal Secretary for the County of Orange.

### ***Education Substitution***

Legal/Paralegal courses or training may be substituted for up to one (1) year of the above experience at the rate of three semester units or the equivalent equaling one-month of experience and one hour of job-related training equaling one hour of experience.

### ***Special Requirements***

In addition to the above minimum requirements, candidates must possess one of the following as per California Business and Professions Code 6450:

- (1) A certificate of completion of a paralegal program approved by the American Bar Association (ABA).
- (2) A certificate of completion of a paralegal program at, or a degree from, a postsecondary institution that requires the successful completion of a minimum of 24 semester, or equivalent, units in law-related courses and that has been accredited by a national or regional accrediting organization or approved by the Bureau for Private Postsecondary and Vocational Education.
- (3) A Bachelor's or an advanced degree in any subject, a minimum of one year of law-related experience under the supervision of an attorney who is or has been an active member of the State Bar of California for at least the preceding three years or who has practiced in the federal courts of this state for at least the preceding three years, and a written declaration from this attorney stating that the person is qualified to perform paralegal tasks.
- (4) A high school diploma or general equivalency diploma, a minimum of three years of law-related experience under the supervision of an attorney who is or has been an active member of the State Bar of California for at least the preceding three years or who has practiced in the federal courts of California for at least the preceding three years, and a written declaration from the supervising attorney stating that the person is qualified to perform paralegal tasks. This experience and training shall be completed no later than December 31, 2003.

Every two years all paralegals shall be required to certify completion of four hours of mandatory continuing education in either general law or in a specialized area of law. Every three years certification of four hours of mandatory continuing legal education in legal ethics is required.

### ***License/Certification***

Possession of or ability to obtain a valid California Driver License, Class C or higher by date of appointment may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Frequent walking, standing, sitting, kneeling, squatting, and twisting and bending at the waist. Ability to speak and hear well enough to communicate and take direction in person, over the telephone and in the courtroom. Ability to read standard text, fine print, various handwritings, view a computer monitor, and to drive. May be required to lift up to 25 pounds. Manual dexterity to handwrite and/or use a computer keyboard. Ability to perform daily tasks with independent body mobility, agility, and stamina sufficient to stand or sit, walk, stoop, and bend routinely for prolonged periods. Ability to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard. Ability to independently reason and analyze data, and to reach objective conclusions. Ability to work under stressful conditions, deadlines, and competing priorities. Ability to work with other individuals successfully and collaboratively.

### ***Environmental and Working Conditions***

Essential functions require sufficient physical ability and mobility to work primarily in an office setting around machinery with stationery or moving parts. May have exposure to firearms from working near law enforcement professionals. May work in a non-standard field environment. May work in facilities with adult inmates and/or juveniles who may have multiple and complex health, social, and psychosocial needs. May interact with the public in emotional and occasional hostile situations. May be required to drive a County vehicle or use County-approved means of transportation for job-related travel.



## PARALEGAL

Bargaining Unit: GE General

Class Code:  
2303GE

COUNTY OF ORANGE

Established Date: 11/12/2004

Revision Date: 01/26/2024

### DEFINITION:

Under direction, incumbents assist attorneys in the preparation of cases for trial and hearing matters, prepare exhibits and witnesses for trial, analyze existing information regarding the case at hand, research and interpret pertinent case law, and research and develop the content of legal documents.

### The Paralegal series includes the following:

Paralegal Trainee (2302GE)

Paralegal (2303GE)

Senior Paralegal (2304GE)

### CLASS CHARACTERISTICS:

Positions allocated to this series perform paraprofessional legal assistance at various levels from trainee to advanced journey. Incumbents are under the direction of and provide assistance to one or more attorneys engaged in administrative, family, civil, or criminal law in the offices of County Counsel, District Attorney, Public Defender and Department of Child Support Services.

The Paralegal is the journey-level classification in the occupational series. Positions allocated to this class shall report to an attorney and are assigned progressively complex legal work that is performed under the direction, supervision, and technical review of an attorney. Incumbents may be required to have extensive contact with clients and witnesses. The work performed requires knowledge of legal concepts, principles, terminology and procedures, and the extensive use of legal reference materials. The Paralegal is distinguished from the next higher class, Senior Paralegal, by the latter's lead function, and the high level of technical specialization and complexity of assignments.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Review, summarize and respond to legal pleadings.
2. Request information from local, state, and federal law enforcement agencies, court, and penal institutions.

3. Process, analyze and upload digital evidence for review.
4. Prepare discovery, which may include, but is not limited to, analyzing, indexing, redacting, numbering, and documenting.
5. Review and process requests for criminal record background information in order to determine the existence or non-existence of prior convictions.
6. Research and analyze law sources, such as statutes, ordinances, court decisions, criminal pleadings, police reports, legal documents and articles for use in preparing legal documents such as briefs, pleadings, contracts, deeds, opinions, etc., for review, approval and use by an attorney.
7. Maintain and produce statistical reports.
8. Summarize, organize, and index prior opinions, testimony, depositions, and documentary material from investigations, interrogatories, and court proceedings.
9. Assist clients with placement in social services programs.
10. Analyze probate, guardianship, and conservatorship petitions for compliance with statutes, ordinances, and court orders; recommend granting petitions and correcting deficiencies; assist probate judge with preparation of court orders and contact civil attorneys regarding changes to petitions.
11. Direct preparation of subpoenas and assure witness compliance.
12. Coordinate pre-trial case preparation.
13. Attend court and direct preparation of court orders by office support staff.
14. Analyze elements of cases to identify legal questions.
15. Research authorities and pertinent cases on specific points of law.
16. Prepare points and authorities in support of case.
17. Prepare legal documents by refining content and language of pleading, affidavits, declarations, motions, discovery, and other legal documents.
18. Locate and conduct interviews with parties and potential witnesses and advise attorneys of appropriate action based on the information obtained in the interviews.
19. Arrange and attend evidence examinations with attorneys, investigators and/or expert witnesses.
20. Assist attorneys in trials by formulating juror questionnaires, assisting with jury selection proceedings, and coordinating witness appearances at trial.

**MINIMUM QUALIFICATIONS:****Knowledge of**

- Civil and/or criminal legal processes
- Principles, concepts and methodology of legal research, discovery, and fact investigation
- Legal principles and practice
- Legal terminology
- Principles of legal writing
- Content and language requirements of legal documents
- Rules of evidence and the conduct of court proceedings
- Investigative interviewing techniques

**Ability to**

- Prioritize caseload to meet deadlines
- Extract and organize information from diverse, complex, and obscure sources
- Present statements of fact and law, and argue clearly and logically in written and oral form
- Establish and maintain effective working relationships with members of the legal profession, public officials, and the general public
- Effectively communicate with a variety of individuals representing diverse cultures and backgrounds and function calmly in stressful situations, which will require a high degree of sensitivity, tact, and diplomacy
- Produce clear and concise documents
- Interpret applicable state and federal codes, laws, and statutes
- Exercise appropriate judgment in answering questions and releasing information

***Education and Experience***

One (1) year as a Paralegal Trainee with the County of Orange.

***Or***

Two (2) years of experience in a law office performing paralegal duties that demonstrates possession of the knowledge and abilities listed as minimum qualifications above.

**Or**

Four (4) years of legal office support experience such as Attorney Clerk II, Senior Family Support Officer, Investigative Assistant and Senior Legal Secretary for the County of Orange.

Legal/Paralegal courses or training may be substituted for up to one (1) year of the required experience at the rate of three semester units or the equivalent equaling one-month of experience and one hour of job-related training equaling one hour of experience.

***License/Certification***

Possession of or ability to obtain a valid California Driver License, Class C or higher by date of appointment may be required for some assignments.

***Special Requirements***

In addition to the above minimum requirements, candidates must possess one of the following as per California Business and Professions Code 6450:

- (1) A certificate of completion of a paralegal program approved by the American Bar Association (ABA).
- (2) A certificate of completion of a paralegal program at, or a degree from, a postsecondary institution that requires the successful completion of a minimum of 24 semester, or equivalent, units in law-related courses and that has been accredited by a national or regional accrediting organization or approved by the Bureau for Private Postsecondary and Vocational Education.
- (3) A Bachelor's or an advanced degree in any subject, a minimum of one year of law-related experience under the supervision of an attorney who is or has been an active member of the State Bar of California for at least the preceding three years or who has practiced in the federal courts of this state for at least the preceding three years, and a written declaration from this attorney stating that the person is qualified to perform paralegal tasks.
- (4) A high school diploma or general equivalency diploma, a minimum of three years of law-related experience under the supervision of an attorney who is or has been an active member of the State Bar of California for at least the preceding three years or who has practiced in the federal courts of California for at least the preceding three years, and a written declaration from the supervising attorney stating that the person is qualified to perform paralegal tasks. This experience and training shall be completed no later than December 31, 2003.

Every two years all paralegals shall be required to certify completion of four hours of mandatory continuing education in either general law or in a specialized area of law. Every three years certification of four hours of mandatory continuing legal education in legal ethics is required.

**PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS*****Physical and Mental Requirements***

Frequent walking, standing, sitting, kneeling, squatting, and twisting and bending at the waist. Ability to speak and hear well enough to communicate and take direction in person, over the telephone and in the courtroom.

Ability to read standard text, fine print, various handwritings, view a computer monitor, and to drive. May be required to lift up to 25 pounds. Manual dexterity to handwrite and/or use a computer keyboard. Ability to perform daily tasks with independent body mobility, agility, and stamina sufficient to stand, or sit, walk, stoop, and bend routinely for prolonged periods. Ability to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard. Ability to independently reason and analyze data, and to reach objective conclusions. Ability to work under stressful conditions, deadlines and competing priorities. Ability to work with other individuals successfully and collaboratively.

### ***Environmental and Working Conditions***

Essential functions require sufficient physical ability and mobility to work primarily in an office setting around machinery with stationary or moving parts. May have exposure to firearms from working near law enforcement professionals. May work in a non-standard field environment. May work in facilities with adult inmates and/or juveniles who may have multiple and complex health, social, and psychosocial needs. May interact with the public in emotional and occasional hostile situations. May be required to drive a County vehicle or use County-approved means of transportation for job-related travel.





COUNTY OF ORANGE  
Established Date: 01/26/2024

## SENIOR PARALEGAL

Bargaining Unit: GE General

Class Code:  
2304GE

### DEFINITION:

Under general direction, incumbents assist attorneys in the preparation of the most complex and significant cases for trial and hearing matters. This class serves as the lead-level and is responsible for providing technical guidance to subordinate paralegals. They develop work processes, procedures, facilitate training programs, and serve as a resource for legal matters. Incumbents organize, monitor and schedule work while serving in the lead capacity. This class conducts extensive legal research and interprets pertinent case law, performs the more difficult and complex assignments and prepares exhibits and witnesses for trial, analyzes existing information regarding the case at hand, and develops the content of legal documents as required.

### The Paralegal series includes the following:

Paralegal Trainee (2302GE)  
Paralegal (2303GE)  
Senior Paralegal (2304GE)

### CLASS CHARACTERISTICS:

Positions allocated to this series perform paraprofessional legal assistance at various levels from trainee to advanced journey. Incumbents are under the direction of and provide assistance to one or more attorneys engaged in administrative, family, civil or criminal law in the offices of County Counsel, District Attorney, Public Defender and Department of Child Support Services.

The Senior Paralegal is the advanced journey-level classification in the occupational series. Positions allocated to this class shall report to an attorney and are assigned the most complex and difficult legal assignments that are performed under the direction, supervision, and technical review of an attorney. The work performed requires knowledge of legal concepts, principles, terminology and procedures, and the extensive use of legal reference materials. This position processes a wide variety of complex and difficult civil actions and litigation requiring a thorough knowledge of legal formats and mechanisms. The Senior Paralegal is distinguished from the Paralegal by its lead role in overseeing workloads and providing technical guidance, level of responsibility, accountability, complexity of duties, utilization of independent judgment on actions taken, and amount of time spent performing these duties.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Serves as lead, to include assigning and monitoring work, training employees in work methods, and providing work direction.
2. Provides work assignment guidance and coordination of work to Paralegal staff to ensure case priorities are achieved through administrative efficiencies.
3. Provides input on work performance evaluations and assists with staff development.
4. Conducts or facilitates Paralegal work methods training programs; develops and provides specialized training programs to meet particular needs for County agency personnel (e.g., ethics of law or policies and procedures).
5. Participates in Paralegal recruitment and selection processes.
6. May have responsibilities for highly specialized and complex assignments requiring a high level of independence including the organization of documents used in the prosecution or defense of major crimes and the preparation of associated memoranda.
7. Assists attorneys in extensive preparation of highly sensitive and complex cases involving criminal, civil or administrative cases at all phases of case preparation.
8. Gathers factual information and performs legal research, including research that is not available through routine sources and requires deviation from established procedures.
9. Conducts and reviews client and witness interviews; reviews information to ensure sufficiency and accuracy and identifies additional information required.
10. Locates statutes and relevant case citations; reviews documents to determine compliance with statutes, court decisions, and other applicable laws.
11. Analyzes elements of cases to identify legal questions.
12. Analyzes probate, guardianship, and conservatorship petitions for compliance with statutes, ordinances and court orders; recommend granting petitions and correcting deficiencies; assist probate judge with preparation of court orders and contact civil attorneys regarding changes to petitions.
13. Directs preparation of subpoenas and assure witness compliance.
14. Attends court and direct preparation of court orders by subordinate paralegals.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Principles and techniques of training of civil and/or criminal legal processes
- Principles, concepts and methodology of complex legal research, discovery and fact investigation
- Legal principles and practices

- Legal terminology
- Principles of legal writing
- Content and language requirements of legal documents
- Rules of evidence and the conduct of court proceedings
- Investigative interviewing techniques
- Ethics and legal practice
- Preparation of points and authorities and memoranda

**Ability to**

- Plan, organize, direct, review, and monitor work assignments
- Lead and/or monitor the work of employees performing law-related duties
- Manage complex projects, assign work, monitor progress, and report results to meet operational objectives
- Perform advanced legal research
- Analyze complex legal problems
- Interpret and analyze applicable state and federal codes
- Extract and organize information from diverse, complex and obscure sources
- Present statements of fact and law, and argue clearly and logically in written and oral form
- Establish and maintain effective working relationships with members of the legal profession, public officials and the general public
- Effectively communicate with a variety of individuals representing diverse cultures and backgrounds and function calmly in stressful situations, which will require a high degree of sensitivity, tact and diplomacy
- Produce clear and concise documents
- Interpret applicable state and federal codes, laws and statutes
- Exercise appropriate judgment in answering questions and releasing information
- Negotiate and resolve administrative issues
- Prioritize caseload to meet deadlines

***Education and Experience***

Two (2) years as a Paralegal with the County of Orange.

***Or***

Three (3) years of experience in a law office performing paralegal duties that demonstrates possession of the knowledge and abilities listed as minimum qualifications above.

Legal/Paralegal courses or training may be substituted for up to one (1) year of the required experience at the rate of three semester units or the equivalent equaling one-month of experience and one hour of job-related training equaling one hour of experience.

***License/Certification***

Possession of or ability to obtain a valid California Driver License, Class C or higher by date of appointment may be required for some assignments.

***Special Requirements***

In addition to the above minimum requirements, candidates must possess one of the following as per California Business and Professions Code 6450:

- (1) A certificate of completion of a paralegal program approved by the American Bar Association (ABA).
- (2) A certificate of completion of a paralegal program at, or a degree from, a postsecondary institution that requires the successful completion of a minimum of 24 semester, or equivalent, units in law-related courses and that has been accredited by a national or regional accrediting organization or approved by the Bureau for Private Postsecondary and Vocational Education.
- (3) A Bachelor's or an advanced degree in any subject, a minimum of one year of law-related experience under the supervision of an attorney who is or has been an active member of the State Bar of California for at least the preceding three years or who has practiced in the federal courts of this state for at least the preceding three years, and a written declaration from this attorney stating that the person is qualified to perform paralegal tasks.
- (4) A high school diploma or general equivalency diploma, a minimum of three years of law-related experience under the supervision of an attorney who is or has been an active member of the State Bar of California for at least the preceding three years or who has practiced in the federal courts of California for at least the preceding three years, and a written declaration from the supervising attorney stating that the person is qualified to perform paralegal tasks. This experience and training shall be completed no later than December 31, 2003.

Every two years all paralegals shall be required to certify completion of four hours of mandatory continuing education in either general law or in a specialized area of law. Every three years certification of four hours of mandatory continuing legal education in legal ethics is required.

***PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS***

***Physical and Mental Requirements***

Frequent walking, standing, sitting, kneeling, squatting, and twisting and bending at the waist. Ability to speak and hear well enough to communicate and take direction in person, over the telephone and in the courtroom. Ability to read standard text, fine print, various handwritings, view a computer monitor, and to drive. May be required to lift up to 25 pounds. Manual dexterity to handwrite and/or use a computer keyboard. Ability to perform daily tasks with independent body mobility, agility, and stamina sufficient to stand, or sit, walk, stoop, and bend routinely for prolonged periods. Ability to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard. Ability to independently reason and analyze data, and to reach objective conclusions. Ability to work under stressful conditions, deadlines, and competing priorities. Ability to work with other individuals successfully and collaboratively.

### ***Environmental and Working Conditions***

Essential functions require sufficient physical ability and mobility to work primarily in an office setting around machinery with stationary or moving parts. May have exposure to firearms from working near law enforcement professionals. May work in a non-standard field environment. May work in facilities with adult inmates and/or juveniles who may have multiple and complex health, social, and psychosocial needs. May interact with the public in emotional and occasional hostile situations. May be required to drive a County vehicle or use County-approved means of transportation for job-related travel.



## REAL ESTATE ANALYST

Bargaining Unit: MA Administrative Management

Class Code:  
8282MA

COUNTY OF ORANGE

Established Date: 03/10/2023

Revision Date: 01/26/2024

### DEFINITION:

This class is the first in a five-level **Real Estate Management Series** responsible for the preparation and execution of documents related to leasing, real estate acquisition, property management and/or land development, as well as the coordination of tenant improvements and construction projects associated with real estate acquisitions and leases.

### The Real Estate Management series includes the following:

Real Estate Analyst (8282MA)

Real Estate Administrator (8283MA)

Real Estate Manager (8284MA)

Real Estate Manager, Senior (8285MA)

Real Estate Deputy Director (8286MA)

### CLASS CHARACTERISTICS:

An incumbent performs journey-level analysis, or assists with program administration, which may include providing training and work review to employees at the same level, or serving as a supervisor to multiple contractors, or temporary staff who are assigned to assist with the work being performed. Decision-making includes selecting the method to address a problem or issue, subject to the constraints established by management objectives and direction and making recommendations for management objectives and program administration.

As assigned, an incumbent may assign work and monitor work completion; or supervise volunteers, and/or contractors.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Establishes research criteria, gathers information and/or leads the information gathering process, analyzes information pertaining to real estate transactions, valuations, acquisitions, dispositions, and

development, and uses technical and analytical expertise to develop findings and provide recommendations to higher-level staff.

2. Assists with the administration of less complex real estate programs, projects, or specific functional areas of large complex programs in one or more of the following areas: the preparation, negotiation, execution, and documentation of real estate transactions and related documents; real estate acquisition needs analysis, market research, site search, and site selection; marketing of properties and real property closings; land development disposition evaluations and management of development projects; property management, property inspections, and lease compliance; personal property intake, release, auction, and sales; and real estate technology systems maintenance.
3. Plans and conducts studies, surveys, training sessions, and/or investigations; assists with project or program budget administration and procurement activities; and/or, prepares and conducts financial analyses and forecasts.
4. Researches and develops original reports, materials, presentations, and real estate documents including, but not limited to real estate contracts, deeds, leases, licenses, proposals, estoppel certificates, easements, permits, and/or other real estate instruments; reviews materials prepared by others; and makes presentations, as assigned.
5. Responds to inquiries and/or complaints from vendors, tenants, landlords, facility managers, developers, real estate agents and brokers, legal counsel, the general public, County staff, and/or external agencies; troubleshoots program-related operational issues; and facilitates and/or attends meetings.
6. Administers and ensures compliance with applicable regulations, policies, and procedures.
7. Performs other duties of a similar nature and level as assigned.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Principles and practices of real estate related to the preparation, negotiation, execution, and documentation of real estate transactions, acquisitions, property management, land development, marketing of real property, and/or the intake, release, auction, and sale of personal property
- Applicable real estate terminology, legal requirements, and legal constraints
- Real estate mathematical calculations
- Principles and practices of contract law, management, and negotiation
- Principles and practices of project and program administration
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations and written reports
- Principles and practices of modern budget administration and procurement

- Supervisory principles, practices, and techniques including employee development, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Applicable federal, state, and local laws, codes, regulations, and standards
- Principles and practices of service delivery models
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

### **Ability to**

- Administer real estate programs and activities related to the preparation, negotiation, execution, and documentation of real estate transactions, real estate acquisitions, property management, land development, marketing of real property, and/or the intake, release, auction, and sale of personal property
- Administer real estate programs and projects
- Administer and negotiate contracts
- Prioritize multiple competing work priorities and meeting deadlines
- Research and analyze data, formulate issues, and articulate recommendations
- Monitor and interpret operational data, regulatory and financial information, and statistics
- Administer budgets and procurement processes
- Develop and prepare reports and presentations
- Recommend and implement policies and procedures
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work, as assigned
- Interpret and apply applicable laws, codes, regulations, and standards
- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

### ***Education and Experience***

Three (3) years of professional leasing, real estate acquisition, property management and/or land development experience related to assignment.



A Bachelor's degree in real estate, finance, business administration, or related field may substitute for one (1) year of the required experience.

A Master's degree or higher in real estate, finance, business administration, or related field may substitute for two (2) years of the required experience.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

### ***Environmental and Working Conditions***

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



## REAL ESTATE ADMINISTRATOR

Bargaining Unit: MA Administrative Management

Class Code:  
8283MA

COUNTY OF ORANGE

Established Date: 03/10/2023

Revision Date: 01/26/2024

### DEFINITION:

This class is the second in a five-level **Real Estate Management Series** responsible for the preparation and execution of documents related to leasing, real estate acquisition, property management and/or land development, the coordination of the more complex tenant improvements and construction projects associated with real estate acquisitions and leases, and performing advanced journey-level analysis work assignments.

### The Real Estate Management series includes the following:

Real Estate Analyst (8282MA)

Real Estate Administrator (8283MA)

Real Estate Manager (8284MA)

Real Estate Manager, Senior (8285MA)

Real Estate Deputy Director (8286MA)

### CLASS CHARACTERISTICS:

An incumbent performs advanced journey-level analysis, or assists with program administration or supervision, which may include providing training and work review to employees at the same level, or serving as a supervisor to one non-management employee, multiple contractors, or temporary staff who are assigned to assist with the work being performed. Decision-making includes selecting the method to address a problem or issue, subject to the constraints established by management objectives and direction and making recommendations for management objectives and program administration.

As assigned, an incumbent may serve as a lead worker, assigning work and monitoring work completion; or supervise staff, volunteers, and/or contractors. Supervision of staff includes conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Establishes research criteria, gathers information and/or leads the information gathering process, analyzes information pertaining to real estate transactions, valuations, acquisitions, dispositions, and development, and uses technical and analytical expertise to develop findings and provide recommendations to higher-level staff.
2. Administration of complex real estate programs, projects, or specific functional areas of large complex programs in one or more of the following areas: the preparation, negotiation, execution, and documentation of real estate transactions and related documents; real estate acquisition needs analysis, market research, site search, and site selection; marketing of properties and real property closings; land development disposition evaluations and management of development projects; property management, property inspections, and lease compliance; personal property intake, release, auction, and sales; and real estate technology systems maintenance.
3. Plans and conducts studies, surveys, training sessions, and/or investigations; assists with project or program budget administration and procurement activities; and/or, prepares and conducts financial analyses and forecasts.
4. Assists with the management of operational activities including the identification of business processes and opportunities for continuous improvement, drafting of operational policies and procedures, and measurement and analysis of performance indicators.
5. Researches and develops original reports, materials, presentations, and real estate documents including, but not limited to real estate contracts, deeds, leases, licenses, proposals, estoppel certificates, easements, permits, and/or other real estate instruments; reviews materials prepared by others; and makes presentations, as assigned.
6. Responds to inquiries and/or complaints from vendors, tenants, landlords, facility managers, developers, real estate agents and brokers, legal counsel, the general public, County staff, and/or external agencies; troubleshoots program-related operational issues; and facilitates and/or attends meetings.
7. As assigned, serves as a lead worker, or supervises staff, volunteers, and/or contractors, including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
8. Administers and ensures compliance with applicable regulations, policies, and procedures.
9. Performs other duties of a similar nature and level as assigned.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Principles and practices of real estate related to the preparation, negotiation, execution, and documentation of real estate transactions, acquisitions, property management, land development, marketing of real property, and/or the intake, release, auction, and sale of personal property
- Applicable real estate terminology, legal requirements, and legal constraints
- Real estate mathematical calculations

- Principles and practices of contract law, management, and negotiation
- Principles and practices of project and program administration
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations and written reports
- Principles and practices of modern budget administration and procurement
- Supervisory principles, practices, and techniques including employee development, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Applicable federal, state, and local laws, codes, regulations, and standards
- Principles and practices of service delivery models
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

**Ability to**

- Administer real estate programs and activities related to the preparation, negotiation, execution, and documentation of real estate transactions, real estate acquisitions, property management, land development, marketing of real property, and/or the intake, release, auction, and sale of personal property
- Administer real estate programs and projects
- Administer and negotiate contracts
- Prioritize multiple competing work priorities and meeting deadlines
- Research and analyze data, formulate issues, and articulate recommendations
- Monitor and interpret operational data, regulatory and financial information, and statistics
- Administer budgets and procurement processes
- Develop and prepare reports and presentations
- Recommend and implement policies and procedures
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work, as assigned
- Interpret and apply applicable laws, codes, regulations, and standards

- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

### ***Education and Experience***

One (1) year of experience as a Real Estate Analyst or its equivalent with the County of Orange

Four (4) years of professional leasing, real estate acquisition, property management and/or land development experience related to assignment.

A Bachelor's degree in real estate, finance, business administration, or related field may substitute for one (1) year of the required experience.

A Master's degree or higher in real estate, finance, business administration, or related field may substitute for two (2) years of the required experience.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

### ***Environmental and Working Conditions***

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



## REAL ESTATE MANAGER

Bargaining Unit: MA Administrative Management

Class Code:  
8284MA

COUNTY OF ORANGE

Established Date: 03/10/2023

Revision Date: 01/26/2024

### DEFINITION:

This class is the third in a five-level **Real Estate Management Series** responsible for supervising staff engaged in real estate transactions including acquisition, leasing, development, sales and asset management of real property and lease management, concession management and revenue generation. Incumbents also procure, evaluate, and negotiate the most complex and significant real estate transactions and manage and enforce tenant agreements at County facilities. Work includes oversight of work product including preparing and reviewing documents, ensuring that project timelines are met, and dealing with escalated issues.

### The Real Estate Management series includes the following:

Real Estate Analyst (8282MA)

Real Estate Administrator (8283MA)

Real Estate Manager (8284MA)

Real Estate Manager, Senior (8285MA)

Real Estate Deputy Director (8286MA)

### CLASS CHARACTERISTICS:

Incumbents supervise programs of varying sizes or smaller work units typically with supervisory authority over at least two or more management-level staff. Decision-making includes using discretion for program decisions to achieve management objectives, with accompanying accountability for those decisions. An individual contributor who is a designated subject matter expert and who serves as a manager of a Countywide enterprise or highly technical and specialized function, without direct supervisory responsibilities may be assigned to this level.

As assigned, an incumbent supervises management and non-management level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Plans, coordinates, and evaluates more complex real estate programs, concessions, licenses, and/or projects in one or more of the following areas: the preparation, negotiation, execution, and

documentation of real estate transactions; real estate acquisition needs analysis, market research, site search, and site selection; sales and asset management of real property; strategic planning of concession/license/lease acquisitions and lease management; review of tenant correspondence, due diligence investigations and analysis; tenant management, agreement monitoring, and tenant improvements; and/or land development

2. Prepares and administers ongoing daily operations to comply with strategic goals and preferred outcomes; manages program planning and resource deployment; ensures compliance with all policies, procedures, quality, and performance standards.
3. Researches, analyzes, develops, and reviews original reports, materials, presentations, real estate and legal documents including, but not limited to: contracts, leases, licenses, agreements, Request for Proposals, memos, letters, and/or other real estate instruments; reviews materials prepared by others; and/or develops and makes recommendations to higher-level staff.
4. Establishes internal and external partnerships; coordinates with County staff, vendors, title companies, consultants, developers, brokers, bankers, tenants, concessions, commissions, the general public, and/or external stakeholders; convenes, facilitates, and/or attends meetings; conducts outreach; and prepares and makes presentations to the public, tenants, commissions, and other stakeholders.
5. Manages complex procurements, revenue contracts, Request for Proposal solicitations, transactions, and budgets for assigned program(s); monitors and approves inventory and procurement processes; prepares and reviews budget requests; negotiation and management of contracts; researches and reviews funding/revenue generation opportunities; collects and analyzes financial/market information; and makes budgetary and financial recommendations to higher-level staff, and oversees implementation.
6. Oversees the preparation of and/or prepare, review, design, and/or maintain reports, agendas, records, plans, presentations, real estate instruments and legal documents (e.g. contracts, leases, licenses, agreements, proposals, and deeds), and other materials; research and analyze policy and related information; and makes recommendations to higher-level staff.
7. Ensures a healthy and safe work environment; and ensures compliance with applicable regulations, policies, and procedures.
8. Supervises professional, paraprofessional, and support level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
9. Performs other duties of a similar nature and level as assigned

## **MINIMUM QUALIFICATIONS:**

### **Knowledge of**

- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work.
- Principles and practices of real estate related to the preparation, negotiation, execution, and documentation of real estate transactions, real estate acquisitions, marketing of real property, property

management, tenant management and improvements, and land development, concessions and revenue generation from real estate assets, request for proposal development, and evaluation

- Applicable real estate terminology
- Legal requirements and constraints
- Real estate mathematical calculations
- Principles and practices of contract law, management, and negotiation
- Principles and practices of modern business management
- Principles and practices of budgeting and fiscal management
- Principles and practices of program and project planning and administration
- Principles and practices of service delivery models
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations
- Applicable federal, state, and local laws, codes, regulations, and standards
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

#### **Ability to**

- Manage and implement assigned real estate programs or projects related to the preparation, negotiation, execution, and documentation of real estate transactions, the acquisition of real estate, the marketing of real property, concession and property management, tenant management and improvement projects, and/or land development
- Oversee the procurement, administration and negotiation of contracts
- Oversee adherence to quality assurance and standards
- Interpret, monitor, and report financial information and statistics
- Research industry trends, solutions, and best practices
- Compile and analyze data, formulate issues, and articulate recommendations
- Prepare original reports, contracts, agreements, content, documents, presentations, and other real estate instruments as well as reviewing and editing materials prepared by others



- Recommend, develop, and implement policies and procedures
- Exercise political acumen, tact, and diplomacy
- Interpret and apply applicable laws, codes, regulations, and standards
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills to interactions with coworkers, supervisors, stakeholders, the general public, and others to sufficiently exchange or convey information, collaborate, persuade, and to receive work direction, and understand stakeholder interests

### ***Education and Experience***

One (1) year experience as a Real Estate Administrator or two (2) years of experience as a Real Estate Analyst or its equivalent with the County of Orange.

### ***Or***

Five (5) years of professional leasing, real estate acquisition, property management, concessions, and/or land development experience related to assignment; must include one (1) year of lead/ supervisory experience.

A Bachelor's degree in real estate, finance, business administration, or related field may substitute for one (1) year of the required experience.

A Master's degree or higher in real estate, finance, business administration, or related field may substitute for two (2) years of the required experience.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders

repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

***Environmental and Working Conditions***

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



## REAL ESTATE MANAGER, SENIOR

Bargaining Unit: MA Administrative Management

Class Code:  
8285MA

COUNTY OF ORANGE

Established Date: 03/10/2023

Revision Date: 01/26/2024

### DEFINITION:

This class is the fourth in a five-level **Real Estate Management Series** responsible for supervising the leasing and management of the County's real estate assets or leading the business property division. Work includes reviewing and approving complex real estate and legal documents (contracts, leases, deeds, and other instruments), overseeing the most complex transactions and/or valuations, and representing the office to the Board of Supervisors and general public.

### The Real Estate Management series includes the following:

Real Estate Analyst (8282MA)

Real Estate Manager (8283MA)

Real Estate Manager (8284MA)

Real Estate Manager, Senior (8285MA)

Real Estate Deputy Director (8286MA)

### CLASS CHARACTERISTICS:

Incumbents oversee multiple highly complex real estate operational functions and/or an organizational work unit exercising first-level (direct) supervision to multiple management level employees, indirect supervision to additional management and/or non-management level employees, and have responsibility for significant budget/funding levels. Decision-making includes establishing work unit objectives and goals, exercising considerable discretion in selecting the method to address a problem or issue, and fostering collaboration among and between the work units supervised as well with work units under the direction of others.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Provides operational and technical management and direction to staff including, but not limited to, one or more of the following areas: real property document development, review, and approval; leasing, concession, and licensing property management; lease and market valuation studies; rent surveys and appraisal reviews; real estate portfolio database management; strategic planning for future County occupancy needs; and/or the identification of unsecured values on behalf of the County Assessor.
2. Troubleshoots and resolves program or work unit issues and keeps higher-level management informed of issues/resolution.
3. Develops, implements, and evaluates services and programs to ensure compliance with strategies and performance goals; manages work systems, processes, and documentation practices; maintains and updates procedures, and ensures compliance; researches trends and best practices; and recommends and implements changes.
4. Develops and administers work unit budgets and procurement processes; reviews and approves budget requests and transactions; negotiates and manages contracts and/or oversees the negotiation and management of contracts; researches and analyzes financial information; makes resource allocation recommendations; and implements resource allocation decisions.
5. Oversees the preparation of and/or prepares, reviews, designs, and/or maintains reports, agendas, records, plans, presentations, real estate instruments and legal documents (e.g. contracts, leases, licenses, agreements, proposals, and deeds), and other materials; oversees the research and analysis of policy and related information; and makes recommendations to higher-level staff.
6. Coordinates with the general public, County staff, boards, service providers, and/or external agencies; convenes, facilitates, and attends meetings; and prepares and makes presentations to the public, elected officials, and other stakeholders.
7. Oversees and conducts performance evaluations, employee development, hiring, discipline, and termination procedures as well as directly supervises management, professional, paraprofessional, and support staff, as assigned.
8. Performs other duties of a similar nature and level as assigned.

## **MINIMUM QUALIFICATIONS:**

### **Knowledge of**

- Principles and practices of real estate operations related to: the preparation, negotiation, execution, and documentation of real estate transactions; leasing and licensing property management; lease and market valuation studies; rent surveys and appraisal reviews; real estate portfolio database management; strategic planning for occupancy needs; and/or the identification of unsecured values on behalf of the County Assessor
- Applicable real estate terminology
- Legal requirements and legal constraints
- Real estate mathematical calculations

- Principles and practices of contract law, management, and negotiation
- Principles and practices of modern business management
- Principles and practices of budgeting and fiscal management
- Principles and practices of program planning and administration
- Principles and practices of service delivery models
- Principles and practices of project management
- Principles and practices of strategic planning and performance measurement
- Principles and practices of modern procurement and administration
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations
- Applicable federal, state, and local laws, codes, regulations, and standards
- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

#### **Ability to**

- Manage the operations of real estate services and programs related to: the preparation, negotiation, execution, and documentation of real estate transactions; leasing and licensing property management; lease and market valuation studies; rent surveys and appraisal reviews; real estate portfolio database management; strategic planning for occupancy needs; and/or the identification of unsecured values on behalf of the County Assessor
- Oversee the administration and negotiation of contracts
- Ensure ongoing compliance with strategic objectives and measuring performance; participating in the development of goals and strategic objectives
- Manage budgets and allocate resources
- Interpret, monitor, and report financial information and statistics
- Monitor and execute procurement activities for the assigned work unit

- Manage large-scale complex projects and/or initiatives, enterprise projects, and/or overseeing the management of multiple projects simultaneously
- Oversee the implementation of, and adherence to, quality assurance activities and standards
- Research, recommend, and implement industry trends, solutions, and best practices
- Oversee the preparation of original real estate instruments, reports, content, documents, and presentations
- Develop and implement policies and procedures
- Exercise political acumen, tact, and diplomacy
- Collaborate with program stakeholders, elected and appointed boards, the public, and internal leadership
- Interpret and apply applicable laws, codes, regulations, and standards
- Supervise and evaluate staff performance, train, coach, coordinate deadlines, prioritize work demands, and assign/monitor work
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

### ***Education and Experience***

One (1) year of experience as a Real Estate Manager or two (2) years of experience as Real Estate Administrator or its equivalent with the County of Orange.

### ***Or***

Five (5) years of professional leasing, real estate acquisition, property management and/or land development experience related to assignment; must include two (2) years of lead/supervisory experience.

A Bachelor's degree in real estate, finance, business administration, or related field, may substitute for one (1) year of the required experience.

A Master's degree or higher in real estate, finance, business administration, or related field may substitute for two (2) years of the required experience.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

### ***Environmental and Working Conditions***

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



## REAL ESTATE DEPUTY DIRECTOR

COUNTY OF ORANGE  
 Established Date 03/10/2023  
 Revision Date: 01/26/2024

Bargaining Unit: MA Administrative Management

Class Code:  
 8286MA

### DEFINITION:

This class is the fifth in a five-level **Real Estate Management Series** responsible for overseeing County-wide real estate transactions including real property document development, review, and approval; leasing and licensing property management; lease and market valuation studies; rent surveys and appraisal reviews; real estate portfolio database management; strategic planning for future County occupancy needs; and the real and personal property assessment, appraisal, enforcement and appeals process for the parcels contained on Orange County's tax rolls.

### The Real Estate Management series includes the following:

Real Estate Analyst (8282MA)  
 Real Estate Administrator (8283MA)  
 Real Estate Manager (8284MA)  
 Real Estate Manager, Senior (8285MA)  
 Real Estate Deputy Director (8286MA)

### CLASS CHARACTERISTICS:

An incumbent serves as a second level or higher supervisor and has middle management level responsibilities that include making broad policy decisions and recommendations to the department head or County executive team. Work includes making interpretive decisions on behalf of the organization regarding the means for executing the goals established by the relevant executives and governing body subject to constraints imposed by available technology and resources. Such interpretive decisions provide context for the work to be accomplished by subordinates supervised within the units managed. An incumbent typically reports to a Deputy Director, Department Head or the Chief Real Estate Officer.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*



1. Oversees County-wide real estate transactions including real property document development, review, and approval; leasing and licensing property management; lease and market valuation studies; rent surveys and appraisal reviews; real estate portfolio database management; and strategic planning for future County occupancy needs.
2. Oversees property assessment operations including assessment planning and implementation, secured and supplemental property roll production, assessment enforcement and appeals processes, and expert witness testimony on real property issues.
3. Develops, implements, and evaluates services, programs, and large-scale projects; plans and evaluates system-wide procedures, policies, strategies, and goals; maintains, updates, and ensures procedural compliance for programs and projects; and interprets and enforces assessment and valuation standards, and applicable case and regulatory laws, policies, and procedures.
4. Develops, administers, and oversees budgets; oversees the Real Estate or Real Property Division procurement activities; reviews and approves budget requests and transactions; researches and analyzes financial information; makes resource allocation decisions and recommendations; and ensures adherence to budgetary and other applicable requirements, policies, and procedures.
5. Oversees the preparation of and/or prepares, reviews, designs, and/or maintains reports, records, plans, contracts, and other documents; coordinates the research and analysis of department-wide policy and related information; and makes recommendations to higher-level staff.
6. Coordinates with County officials, County staff, the public, and/or external agencies; develops internal and external partnerships; responds to escalated complaints and operational issues; and manages ongoing program operations and processes.
7. Convenes, facilitates and/or attends meetings, briefings, legal hearings, and presentations with County staff, commissions, boards, and/or other external stakeholders; and prepares and makes presentations.
8. Oversees and conducts performance evaluations, employee development, hiring, discipline, and termination procedures as well as directly supervises management, professional, paraprofessional, and support staff, as assigned.
9. Performs other duties of a similar nature and level as assigned.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Principles and practices of real estate operations related to the preparation, negotiation, execution, and documentation of real estate transactions; leasing and licensing property management; lease and market valuation studies; rent surveys and appraisal reviews; real estate portfolio database management; strategic planning for occupancy needs
- Principles and practices of property assessment, valuation, secured and supplemental assessment roll production, assessment enforcement, and appeals processes

- Principles and practices of real and personal property appraisal, factors which determine the value of real, business, and personal property and valuation methods
- Applicable real estate terminology
- Applicable federal, state, and local laws, codes, regulations, and standards
- Principles and practices of modern business management
- Principles and practices of budgeting and fiscal management including fund accounting
- Principles and practices of program planning and administration
- Principles and practices of service delivery models
- Principles and practices of project and contract management principles
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral and written presentations
- Supervisory principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

### **Ability to**

- Supervise and evaluate staff performance, training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Plan and manage services and programs for property assessments, valuations, secured and supplemental assessment roll production, assessment enforcement, and appeals processes
- Interpret and apply applicable laws, codes, regulations, and standards
- Identify strategic objectives, ensure ongoing compliance, and measure performance
- Manage budgets and allocate resources to achieve strategic objectives
- Interpret, monitor, and report financial information and statistics
- Monitor and direct procurement activities for the assigned area of responsibility
- Oversee the implementation of, and adherence to, quality assurance activities and standards

- Review research and implement industry trends, solutions, and best practices
- Oversee the preparation of original reports, content, documents, and presentations
- Develop and implement policies and procedures
- Exercise political acumen, tact, and diplomacy
- Collaborate with County staff, program stakeholders, elected and appointed boards, the public, and internal leadership
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

### ***Education and Experience***

Two (2) years of experience as a Real Estate Manager, Senior or three (3) years of experience as a Real Estate Manager or its equivalent with the County of Orange.

### ***Or***

Six (6) years of management leasing, real estate acquisition, property management and/or land development experience; must include two (2) years of supervisory experience.

A Bachelor's degree in real estate, finance, business administration, or related field may substitute for one (1) year of the required experience.

A Master's degree or higher in real estate, finance, business administration, or related field may substitute for two (2) years of the required experience.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders

repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

***Environmental and Working Conditions***

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



## SECRETARY I

Bargaining Unit: CL Office Services

Class Code:  
0579CL

COUNTY OF ORANGE

Established Date: 10/03/1980

Revision Date: 01/26/2024

### DEFINITION:

Under general supervision, to provide secretarial and administrative support for one or more Mid-Level Manager with specialized attention to the information, decision and communication that may be sensitive or confidential; to assist Managers by assuming a variety of administrative detail and non-routine work; to screen and answer telephone calls and correspondence; and to do other work as required.

### The Secretary series includes the following:

Secretary I (0579CL)

Secretary II (0578CL)

Secretary III (0580CL)

### CLASS CHARACTERISTICS:

This class differs from other clerical classes by its direct support of and confidential role to one or more Mid-Level Manager serving in an administrative, professional or technical capacity. All classes in the Secretary series perform duties composed of similar secretarial and administrative activities. Each level in the series is characterized by the level of manager served and responsibilities delegated. The duties of all the positions are very similar, but the higher the level of the manager to whom the position is assigned, the more complex, confidential, and relatively significant the duties become.

This frequently includes learning of specialized subject matter, delegation of specific responsibilities and a confidential working relationship with the Manager(s) supported.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Performs office duties directly for one or more Mid-Level Manager, may serve as receptionist and schedule appointments; may relieve from routine office details as directed.
2. Acts in a liaison between Manager and their subordinates; transmits messages, orders and requests, both written and verbal, and supports the Manager's designee in their absence.
3. Screens and prioritizes office visitors and telephone callers, referring callers to another appropriate source of information or service; distributes standard information on policies, programs and

procedures in accordance with general guidelines.

4. Takes and transcribes dictation notes or transcribes from recorded dictation or video recordings; composes correspondence as directed, requiring a knowledge of the duties of Managers and office procedures and policies. Reviews outgoing correspondence and attaches documents prepared for Manager's signature for consistency with routine procedural requirements and proper format and grammatical construction.
5. Composes standard or routine letters, emails, reports, case records and other finished copy from rough drafts, marginal notes, or general instructions; assembles information from various sources; arranges material into proper format; corrects grammar, punctuation and spelling; proofreads finished copy.
6. Maintains confidential and sensitive informational or operational records; prepares statistical or other types of reports in accordance with predetermined forms and procedures; screens reports for completeness and arithmetical accuracy; lists, abstracts or summarizes data.
7. Prepares and maintains electronic and hard files for records and correspondence; maintains manuals and updates resource materials.
8. On referral from Manager(s) or after personally screening correspondence, answers routine requests for information by enclosing materials, attaching documents, or sending form letters or emails; composes routine letters or correspondence on factual subjects.
9. May assist in training new workers; may support the Manager(s) designee in their absence.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Principles of writing and grammar, including correct English usage, spelling and proper word usage, vocabulary, punctuation and sentence structure
- Telephone and email etiquette
- Modern office methods and practices including filing systems, business correspondence, receptionist techniques and report writing
- Confidentiality principles and working with highly sensitive information
- Modern office technology, business systems and equipment, and applications relevant to area of assignment
- Practice of providing customer service
- The functions and basic office services operations of an administrative office
- General computer software such as Microsoft Office Suite applications, Adobe Acrobat Pro, DocuSign, Zoom, etc.
- Basic principles of mathematics

**Ability to**

- Plan, organize and complete work rapidly and efficiently despite frequent interruptions and/or distractions
- Learn, interpret and apply administrative and departmental policies, laws and rules with particular reference to the activities of the County agency/department where the position is assigned
- Follow written and oral instructions and be able to give instructions to others
- Manage calendar(s), schedule meetings and conferences, coordinate with all parties, and make travel arrangements
- Exercise a high level of confidentiality, discretion, diplomacy and sound judgment
- Take dictation or notes for long periods of time or when numerous people are speaking, such as at meetings or conferences
- Compose correspondence from notes, verbal instructions following policy and guidelines
- Proofread written materials to identify errors in punctuation, spelling and grammar
- Stay up to date with computer software applications
- Maintain electronic and hard files for records, correspondences and prepare reports
- Identify phone callers, identify the nature of their problem or need and take appropriate action
- Meet the public in situations requiring tact, diplomacy and poise, and effectively communicate over the phone
- Make arithmetic computations including percentages and multiplication and division of fractions as required
- Type at a corrected rate of 45 words per minute from clear copy
- Take dictation at a corrected rate of 85 words per minute and accurately transcribe into final form may be required

***Education and Experience***

One (1) year of secretarial or office experience which would demonstrate possession of knowledge and abilities and at the required level of skill and judgment.

***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

***Special Requirements***

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

**PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS*****Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

***Environmental and Working Conditions***

Possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.





## SECRETARY II

Bargaining Unit: CL Office Services

Class Code:  
0578CL

COUNTY OF ORANGE

Established Date: 10/03/1980

Revision Date: 01/26/2024

### DEFINITION:

Under direction, provides secretarial and administrative support to one or more members of senior management; to assist Senior Level Managers by assuming a variety of administrative detail and non-routine work; to screen and answer telephone calls and correspondence; and to do other work as required.

### The Secretary series includes the following:

Secretary I (0579CL)

Secretary II (0578CL)

Secretary III (0580CL)

### CLASS CHARACTERISTICS:

All classes in the Secretary series perform duties composed of similar secretarial and administrative activities. This class differs from the Secretary I class by direct support of and a confidential role to one or more Senior Level Manager. Because of the level of the manager, work performed, and contracts are likely to be more difficult and sensitive than secretaries to Mid-Level Managers. This class is appropriate only where substantial delegation of authority has been made to the Secretary.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Acts in a liaison capacity between Manager and personnel under supervision; transmits messages, orders and requests, both written and verbal, and supports the Manager's designee in their absence as authorized; maintains office controls on the progress of assignments and projects.
2. Screens and prioritizes office visitors and telephone calls, referring callers to another appropriate source of information or service; personally assists those whose business does not warrant seeing the Manager; exercises judgment and discretion in giving out information on established programs and policies in accordance with general guidelines.
3. Screens and assesses incoming correspondence routed to the official served; arranges correspondence for Manager's reply in order of priority, with appropriate background material attached for reference; refers correspondence to subordinate staff members for reply and may follow up to ensure that

deadlines are met.

4. Takes and transcribes dictation notes or transcribes from recorded dictation and videos; composes correspondence independently or as directed, requiring a knowledge of the duties of Manager and office procedures and policies; types letters, emails, reports and other finished copy from rough drafts and marginal notes; reviews outgoing correspondence and attaching documents prepared for Manager's signature by other staff members for consistency with routine procedural requirements as well as for proper format and grammatical construction.
5. Gathers data for general information purposes, individual requests for special reports and projects; contacts other departments, employees, agencies, and individuals for additional material as necessary; may prepare reports for Manager's approval on request.
6. Maintains informational and operational records; prepares statistical or other types of reports in accordance with predetermined forms and procedures; screen reports for completeness and arithmetical accuracy; lists, abstracts or summarizes data.
7. Relieves Manager of routine personnel, budget, or other operating details, such as scheduling, timekeeping and approving material and purchase requisitions.
8. Makes appointments and arranges conferences and meetings for the Manager; prepares agenda and makes adjustments as necessary in scheduled meeting times; completes arrangements for scheduled meetings; makes travel arrangements. Attends meetings or conferences; takes and/or summarizes notes into minutes and distributes.
9. Prepares and maintains electronic and hard files for records and correspondence; maintains manuals and updates resource materials.
10. On referral from Manager(s) or after personally screening correspondence, answers routine requests for information by enclosing materials, attaching documents, or sending form letters or emails; composes routine letters or correspondence on factual subjects.
11. Coordinates and hosts various engagements, activities, and special events in-person and virtually, as assigned.
12. In addition to secretarial duties, may assign, review and evaluate the work of other office services staff or a subordinate office services work unit.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge of**

- Principles of writing and grammar, including correct English usage, spelling and proper word usage, vocabulary, punctuation and sentence structure
- Telephone and email etiquette

- Modern office methods and practices including filing systems, business correspondence, reception techniques, report writing, and the operation of office equipment
- The functions and basic office services operations of an administrative office
- General computer software such as Microsoft Office Suite applications, Adobe Acrobat Pro, DocuSign, Zoom, etc.
- Office technology and operational specific business systems, equipment, and applications relevant to area of assignment
- Telephone and email etiquette
- Basic principles of mathematics

**Ability to**

- Manage calendar(s), schedule meetings and conferences, coordinate with all parties, and make travel arrangements
- Plan, organize and complete work rapidly and efficiently despite frequent interruptions and/or distractions
- Interpret and apply administrative and departmental policies, laws and rules with particular reference to the activities of the County department where position is assigned
- Exercise a high level of confidentiality, discretion, diplomacy and sound judgment
- Take responsibility and use good judgment in recognizing scope of authority
- Type technical reports and documents
- Compose correspondence independently based on policy and guidelines
- Follow written and oral instructions and be able to give instructions to others
- Proofread written materials to identify errors in punctuation, spelling and grammar
- Take dictation or notes for long periods of time or when numerous people are speaking, such as at meetings or conferences
- Keep complex records and prepare reports
- Stay up to date with computer software applications
- Meet the public in situations requiring tact, diplomacy and poise
- Identify phone callers, identify the nature of their problem or need and take appropriate action

- Make arithmetical computations including percentages and multiplication and division of fractions
- Plan, organize, coordinate and supervise the work of others as required
- Type at a corrected rate of 45 words per minute from clear copy
- Take dictation at a corrected rate of 85 words per minute and accurately transcribe into final form may be required

### ***Education and Experience***

One (1) year experience as a Secretary I.

***Or***

Two (2) years of secretarial or office experience which would demonstrate possession of knowledge and abilities at the required level of skill and judgment.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

## **PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS**

### ***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

### ***Environmental and Working Conditions***

Possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



## SECRETARY III

Bargaining Unit: CL Office Services

Class Code:  
0580CL

COUNTY OF ORANGE

Established Date: 10/03/1980

Revision Date: 01/26/2024

### DEFINITION:

Under general direction, serves as secretary to members of Executive Management, relieving them of a variety of administrative detail and non-routine work; to perform complex and highly responsible clerical work; to interpret policy and administrative regulations; and to do other work as required.

### The Secretary series includes the following:

Secretary I (0579CL)

Secretary II (0578CL)

Secretary III (0580CL)

### CLASS CHARACTERISTICS:

All classes in the Secretary series perform duties composed of similar secretarial and administrative activities. The Secretary III class is distinguished from other clerical and secretarial classes by being restricted to positions that are assigned full secretarial duties for members of executive management with the widest latitude for independent action.

The secretary series differs from the Executive Secretary in that the latter classification is a confidential (at-will) position and serves at the pleasure of an Elected Official, County Executive Office, and Agency Department Head. The Executive Secretary may be required to perform a broader range of highly confidential duties in support of the official or executive supported.

### EXAMPLES OF DUTIES:

*Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.*

1. Acts in a liaison capacity between Executive Managers and their subordinates; transmits messages, orders and requests; supports the Manager's designee in their absence.
2. Screens and prioritizes telephone calls and office visitors which may require answering a variety of questions with considerable tact and judgment; arranges schedule of appointments for the manager exercising considerable discretion in committing the manager's time or referring caller to another appropriate source of information or service; places outgoing calls for the manager; makes travel

arrangements for the manager and their staff.

3. Reviews and assesses incoming correspondence routed to the official served; arranges correspondence for Manager's reply in order of priority, with appropriate background material attached for reference; refers correspondence to subordinate staff member for reply and may follow up to ensure that deadlines are met.
4. Handles confidential information regarding personnel, controversial matters and affairs; based on a thorough knowledge of activities and policies, may take responsibility for releasing information to authorized parties, attorneys and newspaper reporters.
5. Composes and edits correspondence, emails, rough drafts, departmental policies and procedures, memos, reports, letters, PowerPoint presentations, reports, transcripts of minutes, and board or committee agendas and minutes; determines priority of matters for manager and executive team's signature or approval.
6. Serves as secretary to departmental management meetings, committees or public advisory groups; arranges for and sends out notices of meetings, attaching documents, and arranges luncheons; confirms attendance of members; prepares agendas from notes received from several sources; attends meetings and keeps a general record of the activity including some verbatim reports; types minutes for Department Head approval, sending out copies for members, the press and other interested parties.
7. Takes and transcribes dictation from notes or from recorded dictations and videos; composes correspondence independently or as directed, requiring a knowledge of the duties Manager and office procedures and policies; type letters, emails, reports and other finished copy from rough drafts and marginal notes. Reviews outgoing correspondence and attaching documents prepared for Manager's signature by other staff members for consistency with routine procedural requirements and proper format and grammar.
8. Gathers data for general information purposes, and individual requests for special reports and projects; contacts other departments, employees, agencies, and individuals for additional material as necessary; may prepare reports for Manager's approval on request.
9. Maintains informational and operational records; prepares statistical or other types of reports in accordance with predetermined forms, policies, and procedures; screen reports for completeness and arithmetical accuracy; lists, abstracts or summarizes data.
10. Relieves Manager of routine personnel, budget or other operating details, such as scheduling, timekeeping and approving material and purchase requisitions.
11. Maintains a variety of electronic and hard files, record management systems, and records of information pertinent to the administration of the department such as payroll, attendance, reports, and invoices.
12. Coordinates and hosts various engagements, activities, and special events in-person and virtually, as assigned.
13. May review, assign and supervise the work of office services staff.

**MINIMUM QUALIFICATIONS:****Thorough Knowledge of**

- Principles of writing and grammar, including correct English usage, spelling and proper word usage, vocabulary, punctuation, and sentence structure
- The functions and basic office services operations of an administrative office
- Modern office methods, business correspondence, receptionist techniques, reporting writing, maintain digital files, archive as appropriate per records retention schedules, and the operation of office equipment
- General computer software such as Microsoft Office Suite applications, Adobe Acrobat Pro, DocuSign, Zoom, etc.
- Confidentiality principles and working with sensitive information
- Office technology and operational specific business systems, equipment, and applications relevant to area of assignment
- Telephone and email etiquette
- Basic principles of mathematics

**Ability to**

- Interpret and apply administrative and departmental policies, laws and rules with particular reference to the activities of the County department where position is assigned
- Organize and carry out projects with minimal instruction
- Plan, organize and complete work rapidly and efficiently despite frequent interruptions and/or distractions
- Take responsibility and use good judgment in recognizing scope of authority and in reflecting program goals and intent of Manager
- Act as liaison between manager and subordinate transmitting messages, orders and requests
- Compose correspondence independently based on policy and guidelines
- Proofread written materials to identify errors in punctuation, spelling and grammar
- Take dictation or notes for long periods of time or when numerous people are speaking, such as at meetings or conferences
- Communicate orally and in writing with County personnel, Board of supervisors, elected officials, attorneys, visitors, and the general public

- Stay up to date with computer software applications
- Keep complex records and prepare reports such as departmental workload and budgets
- Meet high level officials and the public in situations requiring tact, diplomacy, and poise
- Schedule meetings and conferences, coordinate with all parties, and travel arrangements
- Make commonly used arithmetic computations including use of fractions and percentages
- Plan, organize, coordinate, and supervise the work of others as required
- Type at a corrected rate of 45 words per minute from clear copy
- Take dictation at a corrected rate of 85 words per minute and accurately transcribe it into final form may be required for some positions

### ***Education and Experience***

One (1) year experience as a Secretary II.

### ***Or***

Three (3) years of secretarial/office services experience which would demonstrate possession of knowledge and abilities at the required level of skill and judgment.

### ***License/Certification***

For some positions, possession of a valid California Driver's license, Class C or higher may be required by date of appointment.

### ***Special Requirements***

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

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