

BOARD MEETING DATE: September 1, 2023

AGENDA NO. 14

PROPOSAL: Approve Revisions to Class Specifications; Amend the Salary Resolution to Revise Salaries as Part of the Revision Process; Amend FY 2023-24 Budget By Adding and Deleting Positions to Address Operational Needs

SYNOPSIS: This item is to revise the Deputy Clerk, Deputy Clerk/Transcriber, and Senior Deputy Clerk class specifications based on a classification study of Clerk of the Boards Office positions. In addition, based upon an internal review of case settlement and investigation functions in the General Counsel's Office, staff recommends revisions to the Paralegal, Senior Paralegal, Investigator, and Supervising Investigator class specifications. This item would also increase the salaries for the updated Deputy Clerk/Transcriber and Senior Deputy Clerk positions, the Paralegal and Senior Paralegal positions, and the Supervising Air Quality Inspector position as a related matter. As part of this organizational review process, staff also recommends adding and deleting classifications in the General Counsel's Office to reflect the functions of the proposed revised class specifications.

COMMITTEE: Administrative, August 11, 2023; Recommended for Approval

RECOMMENDED ACTIONS:

1. Revise the class specifications for the Deputy Clerk, Deputy Clerk/Transcriber, and Senior Deputy Clerk positions in the Clerk of the Boards Office, as set forth in Attachment A;
2. Revise the class specifications for the Paralegal, Senior Paralegal, Investigator, and Supervising Investigator positions in the General Counsel's Office, as set forth in Attachment B;
3. Amend Section 53 of the Salary Resolution and Appendices A and B of the Memorandum of Understanding (MOU) between South Coast AQMD and Teamsters Local 911 for: revised Deputy Clerk/Transcriber, and Senior Deputy Clerk positions; the revised Paralegal and Senior Paralegal positions; and the Supervising AQ Inspector position, as set forth in Attachment C; and

4. Amend the FY 2023-24 Budget by adding a Contracts Assistant position and a Senior Paralegal position to the General Counsel's Office, and by deleting two (2) Investigator positions in the General Counsel's Office, as set forth in Attachment D.

Wayne Natri
Executive Officer

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Background

Article 45, Section 1 of the MOU for the Technical & Enforcement and Office, Clerical and Maintenance Units, provides a procedure for employees to request a classification study of their position and duties in order to determine whether their duties and position are properly classified. Through this procedure, the deputy clerk positions in the Clerk of the Boards (COB) Office were evaluated. The proposed revisions to COB class specifications and proposed salary adjustments have been discussed, and agreed upon, with union representatives of the bargaining unit.

Under the direction of the Executive Officer and the Chief Operating Officer, each division continually reviews and assesses staffing resources and functionality to determine whether changes should be made to increase efficiency and effectiveness of South Coast AQMD programs. Class specifications in the General Counsel's Office were evaluated to determine whether their duties and positions were best assigned. The proposed revisions to General Counsel's Office class specifications and proposed salary adjustments have been discussed, and agreed upon, with union representatives of the bargaining unit. In addition, staff recommends amending the FY 2023-24 Budget allocation of positions in the General Counsel's Office to implement the new organizational structure of duties and functions.

Proposal

Clerk of the Boards Office

Led by the Clerk of the Boards, COB staff provide a wide range of routine and complex work in support of the Hearing Board and the Governing Board. The classification study identified the need for the COB class specifications to better reflect the work being performed by staff. The role of the COB Office has evolved over the years, in terms of complexity and volume of work, resources to support the Boards, technology and responsibilities. The proposed revisions to the class specifications of Deputy Clerk, Deputy Clerk/Transcriber, and Senior Deputy Clerk clarify the critical duties performed in support of the Hearing Board and the Governing Board. This includes title changes to, respectively, Deputy Board Clerk I, Deputy Board Clerk II, and Senior Deputy

Board Clerk to establish a clear career ladder with the Clerk of the Boards, as well as to achieve consistency with industry standards.

The classification study also presented information that supports an adjustment of the salaries for the two higher level classifications, in order to better account for the expanded roles of these positions, as well as to fit within the labor market for these jobs.

Accordingly, staff recommends adopting revised class specifications (Attachment A) and an amendment to the Salary Resolution and the Teamsters MOU (Attachment C) for these COB positions.

General Counsel's Office

The General Counsel's Office is responsible for the Minor Source Penalty Assessment Program (MSPAP). Under this program, businesses receiving a Notice of Violation (NOV) and South Coast AQMD agree on actions for the business to comply with clean air requirements and the penalty for the violation. A Supervising Investigator and four Investigators are currently responsible for the implementation of the MSPAP, in terms of reviewing, preparing, and processing NOV cases for resolution of penalties through settlement agreements. In addition, these positions have a significant role in researching, investigating, and evaluating enforcement matters for potential civil and criminal prosecution. The Investigator class also coordinates activities with other government and law enforcement agencies for enforcement purposes.

Based upon an evaluation of the roles within the General Counsel's Office, it was determined that the use of the Senior Paralegal and the Paralegal classifications in the implementation of MSPAP would provide efficiencies in the settlement process. These positions currently prepare legal documents and conduct research in support of civil and criminal litigation conducted by attorneys in the General Counsel's Office. Their duties also include tracking penalty payments, following up on delinquent penalty payments, and filing and securing judgements and liens. Accordingly, staff recommends revising the class specifications for the Paralegal, Senior Paralegal, Investigator, and Supervising Investigator positions to move the settlement-related duties to the Paralegal series. (Attachment B) The revisions will focus the Investigator series on enforcement duties and these classifications will be assigned to the Office of Compliance & Enforcement (OCE).

Because the full responsibility for MSPAP implementation would be assigned to the Paralegal and Senior Paralegal positions, staff recommends the salaries for these two classifications be adjusted to match the salaries of the Investigator and Supervising Investigator positions, respectively. Staff further recommends increasing the salary of the Supervising AQ Inspector position to match the Supervising Investigator position, as part of the integration of the Inspector series into OCE. This would provide opportunities for transfer and cross-training within the OCE division (Attachment C).

Finally, this item proposes to add a Contracts Assistant position and a Senior Paralegal position to the General Counsel's Office, and to delete two Investigator positions from the FY 2023-24 Budget. (Attachment D) Adding a Contracts Assistant position would provide for the use of an existing Paralegal position that is being utilized as a Contract Assistant. Therefore, the final staffing count would be two Senior Paralegals and two Paralegals in the General Counsel's Office to perform settlement duties and the other existing paralegal work. A Supervising Investigator and two Investigator positions will be reassigned to OCE.

Resource Impacts

Sufficient funding exists in the FY 2023-24 Budget, and ongoing costs will be included in future year budgets.

Attachments

- A. Proposed revised class specifications for the Deputy Clerk, Deputy Clerk/Transcriber, and Senior Deputy Clerk positions
- B. Proposed revised class specifications for the Paralegal, Senior Paralegal, Investigator, and Supervising Investigator positions
- C. Proposed amendments to Section 53 of the Salary Resolution and Appendices A and B of the MOU between South Coast AQMD and Teamsters Local 911 for: revised Deputy Clerk/Transcriber, and Senior Deputy Clerk positions; the revised Paralegal and Senior Paralegal positions; and the Supervising AQ Inspector position
- D. Proposed additions and deletions of positions in the FY 2023-24 Budget



Deputy Board Clerk I

Class Code:
413

Bargaining Unit: Office, Clerical, & Maintenance

SOUTH COAST AIR QUALITY MANAGEMENT DISTRICT
Established Date: Sep 11, 1987
Revision Date: Oct 24, 2008, ~~September 1, 2023~~

DESCRIPTION:

DEFINITION: ~~Under general supervision, reviews petitions for variances and schedules hearings; prepares South Coast AQMD and Hearing Board agendas and arranges for public notification of hearings; performs staff support functions for South Coast AQMD Boards; and does other work as required.~~

Under immediate supervision, perform routine support for the Governing Board and Hearing Board; reviews petitions for variances and schedules hearings; arranges for public notification of hearings; performs staff support functions to Governing Board and Hearing Board members; communicates South Coast AQMD and Board policies, guidelines, procedures, and legal requirements to staff and the general public; processes and maintains Board records and files; performs related duties, as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives immediate supervision from the Senior Deputy Board Clerk. Exercises no direct supervision over staff.

CLASSIFICATION STANDARDS: ~~This single-position journey-level class reports to the Senior Deputy Clerk class and is characterized by the responsibility to review petitions for variances from South Coast AQMD Rules and Regulations, schedule and prepare the South Coast AQMD and Hearing Board agendas, arrange for public notification of hearings, and collect emission fees due as a result of variances granted, according to established procedures. The Deputy Clerk class is distinguished from the Deputy Clerk/Transcriber class in that the latter class has primary responsibility for recording, transcribing, and preparing the Findings and Decisions of South Coast AQMD Hearing Board proceedings.~~

CLASS CHARACTERISTICS

This is the entry-level classification in the Deputy Board Clerk series. Initially under close supervision, incumbents learn and perform routine support for the Governing Board and Hearing Board in the Clerk of the Boards Office. As experience is gained, assignments become more varied and complex; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the Deputy Board Clerk II level but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

ESSENTIAL DUTIES:

~~Processes petitions for variances from South Coast AQMD rules and regulations; examines petitions for completeness, accuracy, and compliance with South Coast AQMD rules, regulations, and Hearing Board procedures, and determines the type of hearing required.~~

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~~Schedules South Coast AQMD and Hearing board calendars; prepares daily hearing agendas and monthly schedule of hearings; assembles reports and materials for agenda packages and distributes to Board members and appropriate parties; prepares legal public notices as required by law; notifies all parties of cancelled hearing dates, including variance terminations. May attend hearings and prepare minutes.~~

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~~Answers telephone, routes incoming calls, and addresses walk-in inquiries from petitioners, attorneys and other agencies to provide information on South Coast AQMD regulations, Hearing Board and petition procedures, and scheduled hearing dates; responds to petitioner's requests for variances and assists petitioners in completing the appropriate forms.~~

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~~Collects and logs emission fees due as a result of variances granted; coordinates the verification of fees with the Engineering Division; notifies petitioners of overdue fees, processes routine refunds or the collection of additional fees; reconciles differences in fees by coordinating with the petitioners and appropriate South Coast AQMD divisions; prepares revenues from emission fees for deposit by balancing the check register and completing the bank deposit slip.~~

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~~May contact Hearing Board members on ex parte petitions, take dictation and transcribe Decision and type Minute Orders for Board member's approval and signature.~~

~~Prepares and maintains case files to ensure completeness and accuracy; participates in special~~

projects by compiling, preparing, and assembling data into required format and distributing to appropriate parties.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

Some duties, knowledge, skills, and abilities may be performed in a learning capacity.

- Processes petitions for variances from rules and regulations; examines petitions for completeness, accuracy, and compliance with South Coast AQMD rules, regulations and Hearing Board procedures; determines type of hearing required.
- Schedules hearings; prepares daily hearing agendas and monthly schedule of hearings; assembles reports and materials for agenda packages and distributes to Board members and appropriate parties; prepares legal public notices as required by law; notifies all parties of cancelled hearing dates, including variance terminations; may attend hearings and prepare minutes.
- Answers telephone, routes incoming calls, and addresses walk-in inquiries from petitioners, attorneys, and other agencies to provide routine information on South Coast AQMD regulations, Governing Board procedures and Hearing Board and petition procedures, and scheduled meeting and hearing dates; responds to petitioner's requests for variances and assists petitioners in completing the appropriate forms.
- Collects and logs emission fees due as a result of variances granted; coordinates verification of fees with Engineering & Permitting Division staff; notifies petitioners of overdue fees; processes routine refunds or the collection of additional fees; reconciles differences in fees by coordinating with the petitioners and appropriate staff; prepares revenues from emission fees for deposit.
- May contact Hearing Board members on ex parte petitions; takes minutes, transcribes Decisions, and types Minute Orders for Board member's approval and signature.
- Refers inquiries as needed to appropriate staff; screens and distributes incoming correspondence.
- Prepares and maintains case files to ensure completeness and accuracy; participates in special projects by compiling, preparing, and assembling data into required format and distributing to appropriate parties.
- Coordinates with staff in preparation for Off-Site Hearings and meetings; serves as liaison with South Coast AQMD staff, attorneys for the parties, and the public; travels to off-site hearing location; sets up hearing room; prepares documents for Hearing Board members; assists the public with public comment cards during the hearing and answers procedural questions.
- Performs related duties as assigned.

MINIMUM REQUIREMENTS:

-EITHER I-

~~**EXPERIENCE:** Two years of progressively responsible clerical experience, one year of which must have been as a Senior Office Assistant.~~

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~~-OR II-~~

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~~**EXPERIENCE:** Two years of progressively responsible clerical experience in a legal office or quasi-judicial agency, one year of which must have included typing and processing a variety of legal documents.~~

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~~**SUBSTITUTION:** Completion of core courses from an accredited college or university with a major in secretarial sciences, court reporting, office practices, business education, or a closely related field; or completion of training from a recognized occupational training program in the referenced subject areas may substitute for one year of the required, non-specialized experience on the basis of 18 semester (27 quarter) units or 360 hours of training for one year of experience.~~

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~~**KNOWLEDGE OF:** Basic hearing procedures and legal terminology to process, format, and type legal documents; correct English usage, grammar, spelling, vocabulary, and punctuation to prepare correspondence and proofread finished copy; modern office procedures and recordkeeping practices; standard office machines and automated equipment.~~

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~~**ABILITY TO:** Understand and apply rules and procedures to screen petitions for variances and to develop and maintain the Hearing Board calendar; understand and follow verbal and written instructions; communicate effectively with the public, South Coast AQMD employees, and others to obtain and transmit information and explain South Coast AQMD regulations and Hearing Board and petition procedures; maintain accurate case files and records; operate standard office calculators, data entry terminals, microcomputers, and word processors.~~

~~**SKILLS:** Sufficient skills to type 45 net words per minute.~~

QUALIFICATIONS

Some duties, knowledge, skills, and abilities may be performed in a learning capacity.

Knowledge of:

- Indexing and filing rules and systems, including records management practices; South Coast AQMD organization and operating policies and procedures; legal requirements for filing, publishing, and processing of various Board actions.
- Basic functions and role of an appointed Board.

- Policies and procedures related to the Clerk of the Boards Office.
- Procedures to record and prepare minutes and procedural outcomes of hearings and meetings.
- Hearing procedures and legal terminology to process, format, and type legal documents.
- Standard procedures and rules for the conduct of hearings and meetings.
- Basic business mathematics.
- Cash handling procedures.
- Data processing systems and terminology.
- Applicable federal, state, and local laws, codes, and ordinances relevant to the area(s) of responsibility.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and South Coast AQMD staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs/applications (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Read and comprehend a variety of technical reports, correspondence, and documents.
- Learn to explain South Coast AQMD Rules and regulations and Hearing Board procedures.
- Learn to understand and apply rules and procedures to screen petitions for variances and develop and maintain the Hearing Board calendar.
- Learn to record Board proceedings by hand or electronically; summarize actions accurately and expeditiously.
- Learn to prepare, format, write, and type Minute Orders and Findings and Decisions.
- Maintain accurate and complex case files and records.
- Compose correspondence and routine reports.
- Enter and retrieve data and information stored in a computerized record system with sufficient speed and accuracy to perform assigned work.
- Compile, check and verify data and information for accuracy and completeness.
- Compile and summarize data/information and maintain records.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the South Coast AQMD in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those

contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

High School Diploma or equivalent and two (2) years of progressively responsible clerical experience, and one (1) year of responsible administrative clerical experience preparing legal documents and reports and/or taking and transcribing minutes.

Sufficient skill to type 45 net words per minute.

Licenses and Certifications:

- Possession of, or the ability to obtain, an appropriate, valid California driver's license upon appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, and to operate a motor vehicle to visit meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

Must be willing to attend meetings outside of normal working hours and at locations other than South Coast AQMD offices.



~~Deputy~~ ~~Clerk/Transcriber~~ Deputy Board Clerk II

Class Code:
415

Bargaining Unit: Office, Clerical, & Maintenance

SOUTH COAST AIR QUALITY MANAGEMENT DISTRICT
Established Date: May 3, 1991
Revision Date: Oct 24, 2008, September 1, 2023

DESCRIPTION:

~~**DEFINITION:** Under general supervision, attends and records, in shorthand or by machine, Hearing Board proceedings; prepares Findings and Decisions as rendered by the Hearing Board; performs ministerial, stenographic, and staff support functions for South Coast AQMD's Hearing Board; and does other work as required.~~

DEFINITION

Under general supervision, perform routine to complex support for the Governing Board and Hearing Board; attends and records Hearing Board proceedings; assists Hearing Board members in the Hearing Board room by managing the logistical functioning and flow of meetings and proceedings; prepares Minute Orders and Findings and Decisions, as rendered by the Hearing Board; reviews petitions for variances and schedules hearings; collects Hearing Board petition and excess emissions fees; prepares Hearing Board agendas, and prepares legally required public notices for posting/publication for hearings; performs staff support functions to Governing Board and Hearing Board members; communicates South Coast AQMD and Board policies, guidelines, procedures, and legal requirements to staff and the general public; processes and maintains Board records and files; provides assistance with duties and tasks in support of the Governing Board; and performs related duties, as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Senior Deputy Board Clerk. Exercises no direct supervision over staff.

~~**CLASSIFICATION STANDARDS:** This multi-position, journey-level class reports to the Senior Deputy Clerk class, and is characterized by the responsibility to perform ministerial, stenographic, and staff support functions for the Hearing Board. The Deputy Clerk/Transcriber class is distinguished from the Deputy Clerk class in that the latter class is characterized by responsibility to review petitions, schedule hearings, arrange for public notification, and collect fees. This class is distinguished from the Senior Deputy Clerk class in that the latter class performs supervisory responsibilities over subordinate, journey-level Hearing Board staff; performs the more complex, specialized, and responsible work of the Hearing Board; and assists the Clerk of the Boards with South Coast AQMD Board support activities.~~

CLASS CHARACTERISTICS

This is the fully qualified journey-level classification in the Deputy Board Clerk series. It reports to the Senior Deputy Board Clerk. Positions at this level perform the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

This class is distinguished from the Senior Deputy Board Clerk in that the latter is the full supervisory level in the series, provides supervision to lower-level support staff, and performs more complex, specialized, and responsible work.

ESSENTIAL DUTIES:

~~Attends Hearing Board proceedings to record, in shorthand or by machine, petitioners' arguments and testimony for a variance from South Coast AQMD's rules and regulations.~~

~~Transcribes shorthand or machine records of the Hearing Board's proceedings to prepare, format, and type draft Findings and Decisions for review and approval by Hearing Board members; proofreads copy for completeness, corrects errors in spelling, punctuation, or typing, and prepares finished copy for Board members' signatures; distributes copies of Hearing Board Findings and Decisions to appropriate South Coast AQMD personnel, petitioners, attorneys, and other public agencies.~~

~~Answers telephone, routes incoming calls, and addresses walk-in inquiries from petitioners, attorneys, and other agencies to provide routine information on South Coast AQMD regulations and Hearing Board and petition procedures; provides South Coast AQMD personnel and others with information on Hearing Board Findings and Decisions; schedules hearing dates and petitioners' requests for variances.~~

~~Participates in special projects by compiling, preparing, and assembling data into required format and distributing to appropriate parties.~~

~~May contact Hearing Board members on *ex parte* emergency petitions, take dictation and transcribe Decisions, and typing Minute Orders for Board members' approval and signature; may accept and time stamp petitions, receive payment of fees, and prepare receipts; may assist petitioners in completing appropriate forms and schedule routine Hearing Board cases; may screen and distribute incoming correspondence.~~

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

➤ Attends Hearing Board proceedings in order to: 1) prepare minute orders for each hearing that includes a list of exhibits marked and/or admitted into evidence, as well as the names and identifying information for each hearing participant, including attorneys, witnesses and members of the public; take accurate notes as the Board deliberates and modifies proposed conditions, including all motions, and the votes of each Hearing Board member on each

motion; 2) take accurate notes of testimony and Hearing Board deliberations, reviewing the evidence on which the Board relied to prepare draft Findings and Decision; proofreads copy for completeness, accuracy and compliance with rules, policies, and regulations; and 3) prepare draft Findings and Decision for Hearing Board review, approval and signature, within strict time constraints.

- Records, reviews, and processes a variety of Hearing Board documents such as variance petitions, minute orders, Order for Abatement petitions, proposed orders, Findings and Decision and official notification for hearings/public meetings and motions.
- Assists the Hearing Board Chair or designee with prehearing teleconferences; arranges computer-based conference call system; takes notes during the teleconference; and, at the Chair's discretion, prepares the Prehearing Order following conclusion of the teleconference.
- Schedules hearings; prepares daily hearing agendas and maintains the hearing calendar; assembles documents for hearings, such as variance reports for agenda packages; and distributes to Board members and appropriate parties; prepares public notices as required by law; notifies all parties of cancelled hearing dates; and posts case information on the South Coast AQMD website.
- Edits verbatim transcripts of Governing Board meetings for use by the Senior Deputy Board Clerk.
- Answers telephone, routes incoming calls, and addresses walk-in inquiries from petitioners, attorneys, and other agencies to provide routine information on South Coast AQMD regulations and Governing Board meetings and Hearing Board petition procedures; provides staff and others with information on Hearing Board documents; refers inquiries as needed to appropriate staff; screens and distributes incoming correspondence.
- Acts for the Senior Deputy Clerk as directed.
- Works in collaboration with Hearing Board members to prepare for hearings and finished copies of documents related to proceedings for Board members' signatures.
- Prepares Minute Orders or Expanded Minute Orders, after each hearing that accurately reflects the proceedings for review, approval, and signature by Hearing Board members.
- Works closely with the Hearing Board Chair to coordinate and prepare for hearings and ex parte petitions.
- Serves as liaison between the parties and Hearing Board members to communicate and transmit information.
- Uses audio recording or computer-aided transcription software to prepare or edit written transcripts of Governing Board meetings.
- Assists Senior Deputy Board Clerk with posting Governing Board meeting agendas and filing Governing Board public notices in newspapers.
- Receives Hearing Board petitions and appeals by mail, hand delivery, or email; reviews to

ensure compliance with applicable Hearing Board rules and procedures and Governing Board rules and requests required documentation, if needed.

- Responds to inquiries on case-related issues and provide assistance with filling out forms and Hearing Board procedures; creates legal notices and publishes and/or posts notices as required; processes abatement orders filed by South Coast AQMD District Counsel.
- Receives payment for Hearing Board petition and excess emission fees and prepares receipt logs.
- Prepares and maintains case files to ensure completeness and accuracy; and scan and archive documents following electronic documents management procedures.
- Participates in special projects by compiling, preparing, and assembling data into required format and distributing to appropriate parties.
- Assists in preparing for off-site hearings; serves as liaison with staff, attorneys for the parties, and members of the general public; travels to off-site hearing location; sets up hearing room; prepares documents for Hearing Board members; assists the public with public comment cards and answers procedural questions.
- Assists in preparing for Governing Board meetings and annual retreat and may be required to attend to provide staff support.
- Retrieves and compiles documents for Governing Board and Hearing Board Public Records Act and administrative record requests.
- May be required to track Governing Board agenda items in agenda management system.
- Performs related duties as assigned.

MINIMUM REQUIREMENTS:

~~**SKILL:** Type 45 net words per minute and take dictation at a rate of 80 net words per minute.~~

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~~-EITHER I-~~

~~**EXPERIENCE:** Two years of progressively responsible stenographic experience, one year of which must have included typing and processing legal documents and reports.~~

~~-OR II-~~

~~**EXPERIENCE:** Two years of progressively responsible secretarial experience, one year of which must have included taking dictation and transcribing minutes for meetings.~~

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SUBSTITUTION: Completion of core courses from an accredited college or university with a major in secretarial sciences, court reporting, office practices, business education, or a closely related field, or completion of training from a recognized occupational training program in one of the referenced subject areas may substitute for the non-specialized experience required under either option described above on the basis of 18 semester (27 quarter) units or 360 hours of training for one year of experience.

KNOWLEDGE OF: Procedures to record and prepare minutes of meetings; hearing procedures and legal terminology to process, format, and type legal documents; correct English usage, grammar, spelling, vocabulary, and punctuation to prepare correspondence and proofread finished copy; modern office and recordkeeping practices; standard office machines and automated equipment.

ABILITY TO: Record Hearing Board proceedings in shorthand or by machine, and transcribe records accurately and expeditiously; prepare, format, and type Findings and Decisions; understand and follow oral and written instructions; communicate effectively with the public, South Coast AQMD employees, and others to obtain and transmit information and explain South Coast AQMD regulations and Hearing Board and petition procedures; maintain accurate and complex case files and records; operate standard office machines, including calculators, data-entry terminals, microcomputers, and word processing equipment; establish and maintain effective working relationships with South Coast AQMD personnel and others contacted in the course of work.

QUALIFICATIONS

Knowledge of:

- Procedures to record and prepare minutes and procedural outcomes of hearings and meetings.
- Hearing procedures and legal terminology to process, format, and type legal documents.
- Standard procedures and rules for the conduct of hearings and meetings.
- Indexing and filing rules and systems, including records management practices; South Coast AQMD organization and operating policies and procedures; legal requirements for filing, publishing, and processing of various Board actions.
- Basic functions and role of an appointed Board.
- Policies and procedures related to the Clerk of the Boards Office.
- Basic business mathematics.
- Cash handling procedures.
- Data processing systems and terminology.
- Applicable federal, state, and local laws, codes, and ordinances relevant to the area(s) of responsibility.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and South Coast AQMD staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs/applications (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Record Board proceedings by hand or electronically; summarize actions accurately and expeditiously.
- Prepare, format, write, and type Minute Orders and Findings and Decisions.
- Utilize critical thinking skills and knowledge of the South Coast AQMD rules and state law to independently write the Findings and Decision for Hearing Board review, approval and signature, reviewing the evidence on which the Board relied and providing the reasoning the Board used in its public deliberations to reach its conclusion on each of the six legally required findings.
- Read and comprehend a variety of technical reports, correspondence, and documents.
- Explain South Coast AQMD rules and regulations and Hearing Board procedures.
- Understand and apply rules and procedures to screen petitions for variances and develop and maintain the Hearing Board calendar.
- Maintain accurate and complex case files and records.
- Compose correspondence and routine reports.
- Enter and retrieve data and information stored in a computerized record system with sufficient speed and accuracy to perform assigned work.
- Compile, check and verify data and information for accuracy and completeness.
- Compile and summarize data/information and maintain records.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent South Coast AQMD in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

High School Diploma or equivalent and three (3) years of progressively responsible clerical experience, which should include two (2) years of responsible administrative clerical experience preparing legal documents and reports and/or taking and transcribing minutes.

Sufficient skills to type 45 net words per minute.

Licenses and Certifications:

Possession of, or the ability to obtain, an appropriate, valid California driver's license upon appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, and to operate a motor vehicle to visit meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

Must be willing to attend meetings outside of normal working hours and at locations other than South Coast AQMD offices.



Senior Deputy Board Clerk

Class Code:
412

Bargaining Unit: Office, Clerical, & Maintenance

SOUTH COAST AIR QUALITY MANAGEMENT DISTRICT
Established Date: May 3, 1991
Revision Date: Oct 31, 2008, September 1, 2023

DESCRIPTION:

DEFINITION: Under general supervision, assigns, coordinates, reviews, and participates in a variety of ministerial, stenographic, and staff support functions for South Coast AQMD Boards; performs complex, specialized, and responsible Hearing Board staff activities; and does other work as required.

DEFINITION

Under general direction, plans, organizes, supervises, and reviews the work of staff involved in providing support for the Governing Board and Hearing Board; performs complex, specialized, and responsible duties to assist in the operations the Clerk of the Boards Office; provides technical guidance and training to subordinate staff; prepares agendas and compiles supporting materials, records, and documents required for Board meetings; may prepare and edit minutes; maintains records, and other information for the Boards and the South Coast AQMD; acts as the Clerk of the Boards as assigned; performs related duties, as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Clerk of the Boards. Exercises direct or general supervision over administrative and clerical staff.

CLASSIFICATION STANDARDS: This single position class reports to the Clerk of the Boards and is characterized by the responsibility to act in a supervisory capacity over journey level Hearing Board staff, and to perform a variety of complex, specialized, and responsible ministerial, stenographic, and staff support functions. This class is further characterized by the extensive experience and knowledge of ministerial and staff support methods and procedures relating to meetings of the Boards; the exercise of extensive public contact responsibilities requiring the explanation of detailed South Coast AQMD rules, state and federal regulations, and hearing procedures; and the responsibility to act for the Clerk of the Boards, as required. This class is distinguished from the Clerk of the Boards class in that the latter class plans, organizes, and manages the daily operations related to the activities of both Boards.

CLASS CHARACTERISTICS

This is the full supervisory-level class in the Deputy Board Clerk series. Incumbents are responsible for planning, organizing, supervising, reviewing, and evaluating the work of administrative and clerical support staff. Performance of the work requires exercising considerable use of independent judgement, initiative, and discretion within established guidelines.

This class is distinguished from the Clerk of the Boards class in that the latter class has overall management responsibility of the Clerk of the Boards office.

ESSENTIAL DUTIES:

~~Assigns, coordinates, reviews, and participates in ministerial, stenographic, and staff support functions for the South Coast AQMD Boards, and performs the more complex, specialized, and responsible work of the Hearing Board.~~

~~Reviews the Findings and Decisions prepared by staff to ensure accuracy, completeness, and adherence to instructions, established format, and work methods; coordinates and reviews the screening of petitions for variance, the scheduling of cases for Hearing Board meetings, and the collection of fees; participates in the evaluation of staff by counseling employees on work assignments and performance problems; prepares performance evaluations.~~

~~Monitors the workload and prioritizes assignments to ensure the timely completion of work; compiles statistical data and prepares reports on Hearing Board activities for review by the Clerk of the Boards.~~

~~Participates in the selection and training of new employees on operational and Hearing Board rules, regulations, and procedures; provides technical guidance on difficult work problems by explaining the application of operational procedures specific to the situation.~~

~~Coordinates activities for South Coast AQMD Board and Hearing Board meetings, including scheduling meeting rooms and arranging for equipment; monitors case file maintenance and ensures the availability of appropriate supporting documentation and the completion of all legal notice requirements.~~

~~Attends South Coast AQMD and Hearing Board meetings, monitors and records hearings, and advises the chairperson of appropriate procedures; prepares, formats, types, and distributes Minute Orders on actions taken by the Board.~~

~~Screens and routes incoming calls; coordinates the scheduling of cases and acts as liaison with Hearing Board members and legal staff; responds to a variety of calls, requests, and complaints referred by staff.~~

~~Monitors the payment of excess emission fees due as a result of variances granted; coordinates with appropriate parties to reconcile the more difficult fee discrepancies and to process claims for reimbursement; drafts public notices regarding Hearing Board matters not addressed in the Health and Safety Code.~~

~~Coordinates special projects by prioritizing, assigning, monitoring, and reviewing the compilations and preparation of public records and administrative transcripts; prepares the certification of records and distributes to the requesting party.~~

~~Performs a variety of secretarial and staff support functions for Hearing Board members; prepares a variety of non-routine correspondence for own signature and for approval by Board members or the Clerk of the Boards.~~

~~Acts for the Clerk of the Boards, as required.~~

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Plans, organizes, assigns, supervises, and reviews the work of staff assigned to the Clerk of the Boards Office; trains staff in work procedures; evaluates employee performance, counsels employees, and effectively recommends initial disciplinary action; assists in selection and promotion.
- Participates in the development of goals, objectives, policies, and procedures for assigned services and programs, and preparation of the department budget; recommends and participates in the implementation of policies, and work standards.
- Monitors activities and workflow of staff assigned to provide support to the activities of the Governing Board and Hearing Board; identifies opportunities for improving service delivery and procedures; provides recommendations concerning process changes; reviews with appropriate management staff; implements improvements.
- Determines and recommends equipment, materials, and staffing needs for assigned operations, projects, and programs; maintains a variety of records and prepares routine reports of work performance.
- Attends Governing Board meetings, and records official actions taken at Governing Board meetings.
- Assists in the preparation and distribution of Governing Board agenda packets; receives and reviews agenda items to ensure that all submittals are complete and follow established procedures; and posts agendas in compliance with the Brown Act.
- Prepares, coordinates, and reviews Governing Board agenda; tracks, edits, and processes agenda items in tracking system; distributes weekly agenda update to South Coast AQMD staff; prepares correspondence and documents; ensures the legal publication and posting of Board agenda; assigns and coordinates distribution of signed Board letters.
- Establishes, maintains, and updates various files, calendars, and schedules; follows up on matters with critical time deadlines.
- Composes correspondence independently or from brief notes which may require interpretation of policies, procedures, and regulations.
- Provides administrative or related office support to Board members as required.
- Compiles statistical data and prepares reports on Governing Board and Hearing Board activities for review by the Clerk of the Boards and participates in the preparation of the department budget.
- Reviews the Governing Board and Hearing Board notices, Minute Orders, and Findings and Decisions documents prepared by staff to ensure accuracy, completeness, and adherence to established format procedures, and legal requirements.

- Coordinates and reviews the screening of petitions for variance, the scheduling of cases for Hearing Board meetings, and the collection of fees.
- Coordinates activities for Board meetings including scheduling meeting rooms and arranging for equipment; monitors case file maintenance and ensures the availability of appropriate supporting documentation and the completion of all legal notice requirements.
- Maintains the department webpages; ensures accurate and current information is posted.
- Attends Governing Board and Hearing Board meetings, hearing proceedings as required; assists the public with questions regarding meeting and agenda items; monitors and records hearings; advises the Board chairperson of appropriate procedures; prepares Governing Board minutes for review by the Clerk of the Boards.
- Screens and routes incoming calls; coordinates the scheduling of cases and acts as liaison with Governing Board and Hearing Board members and legal staff; responds to a variety of calls, requests, and complaints referred by staff.
- Monitors the payment of Board petition and excess emission fees; coordinates with appropriate parties to reconcile the more difficult fee discrepancies and to process claims for reimbursement; drafts public notices regarding Governing Board and Heard Board matters.
- Prepares and maintains case files to ensure completeness and accuracy, and participates in special projects by compiling, preparing, and assembling data into required format and distributing to appropriate parties.
- Provides information regarding the Boards and staff, other agencies, and the general public.
- Accepts, processes, and transmits subpoenas and claims, ensuring compliance with South Coast AQMD policies and procedures.
- Coordinates the centralized records management system to ensure proper maintenance and disposition practices in accordance with the records retention policy; provides information gathering and records retrieval research services to South Coast AQMD staff; and assists the Clerk of the Boards in organizing and maintaining history of the Boards including resolutions, formal minutes, and agenda packets.
- Prepares, compiles, and processes public records and administrative records requests.
- Coordinates with South Coast AQMD staff and outside vendors in preparation for off-site proceedings; schedules meeting rooms; arranges for equipment; ensures availability of appropriate supporting documentation; schedules staff to attend and assist with proceedings.
- Acts for the Clerk of the Boards, as assigned.
- Performs related duties as assigned.

MINIMUM REQUIREMENTS:

SKILL: ~~Type 45 net words per minute and take dictation at the rate of 80 net words per minute.~~

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~~-EITHER I-~~

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EXPERIENCE: ~~Two years of progressively responsible stenographic and staff support experience, one year of which must have been as a Deputy Clerk/Transcriber or Legal Secretary.~~

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~~-OR II-~~

~~**EXPERIENCE:** Two years of progressively responsible legal stenographic experience, one year of which must have included taking dictation, transcribing, and typing a variety of legal documents and reports.~~

~~-OR III-~~

~~**EXPERIENCE:** Three years of progressively responsible stenographic or secretarial experience, two years of which must have been as a Secretary and included taking dictation and transcribing minutes of meetings.~~

~~**SUBSTITUTION:** Completion of core courses from an accredited college or university with a major in secretarial sciences, office practices, court reporting, business education, or a closely related field, or completion of training from a recognized occupational training program in one of the above-listed areas may substitute for one year of the non-specialized experience required under any of the above-described options on the basis of 18 semester (27 quarter) units or 360 hours of training for one year of experience.~~

~~**KNOWLEDGE OF:** General South Coast AQMD operations, rules, policies, and procedures; staff support procedures relating to meetings of the Boards or other legislative or administrative boards and committees; correct English usage, spelling, punctuation, grammar, and vocabulary to prepare correspondence and to review and correct the work of staff; modern office practices, standard office machines, and automated equipment; arithmetical computation to compile and prepare statistical data and reports.~~

~~**ABILITY TO:** Assign, coordinate, review, and participate in the work of staff engaged in ministerial, stenographic, and staff support functions for South Coast AQMD's Boards; communicate effectively with a variety of administrators, Board members, officials, and the public; explain and apply detailed laws, rules, policies, and procedures, and resolve procedural problems; operate standard office machines and automated equipment, including calculators, data-entry terminals, microcomputers, and word processing equipment; establish and maintain effective working relationships with South Coast AQMD personnel and others contacted in the course of work.~~

QUALIFICATIONS

Knowledge of:

- Principles and practices of employee supervision, including work planning, assignment review and evaluation, discipline, and the training of staff in work procedures.
- Principles and practices of leadership.
- Standard procedures and rules for the conduct of hearings and meetings.
- Functions and role of an appointed Board.
- Policies and procedures related to the Clerk of the Boards Office.
- Legal requirements for filing, publishing, and processing of various Board matters.
- Records management principles and practices.
- Standard office administrative and secretarial practices and procedures, including filing and business letter writing.
- Arithmetical computation to compile and prepare statistical data and reports.
- Data processing systems and terminology.

- Applicable federal, state, and local laws, codes, and ordinances relevant to the area(s) of responsibility.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and South Coast AQMD staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs/applications (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Select and supervise staff, provide training and development opportunities, ensure work is performed effectively, and evaluate performance in an objective and positive manner.
- Assist in developing and implementing goals, objectives, practices, policies, procedures, and work standards.
- Organize and maintain accurate and complex recordkeeping and indexing systems.
- Research and organize pertinent back-up materials for Board agenda items.
- Process various applications, submittals, and documents in accordance with established codes and requirements.
- Prepare clear, concise, and complete meeting minutes, documentation, and other reports and correspondence.
- Read and comprehend a variety of technical reports, correspondence, and documents.
- Compile, check, proofread and verify data and information for accuracy and completeness.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the office and the South Coast AQMD in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Understand the organization and operation of the South Coast AQMD and of outside agencies as necessary to assume assigned responsibilities.
- Enter and retrieve data and information stored in a computerized record system with sufficient speed and accuracy to perform assigned work.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

High School Diploma or equivalent and four (4) years of increasingly responsible administrative clerical experience providing support to and in the taking and preparing of minutes for a policymaking and/or regulatory governing body equivalent to a Deputy Board Clerk II with the South Coast AQMD.

Sufficient skill to type 55 net words per minute.

Licenses and Certifications:

Possession of, or the ability to obtain, an appropriate, valid California driver's license upon appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, and to operate a motor vehicle to visit South Coast AQMD meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

Must be willing to attend meetings outside of normal working hours and at locations other than South Coast AQMD offices.



July 2023

FLSA: Non-Exempt

PARALEGAL

DEFINITION: Under general supervision, assists attorneys in pretrial and trial preparation; prepares exhibits and witnesses for trial and the Hearing Board; analyzes existing information regarding the case at hand and research pertinent case law; researches and develops the content of legal documents; review, research, compiles case histories of violations, and assesses civil penalties to negotiate settlements; and does other work as required.

CLASSIFICATION STANDARDS: This multiple-position class provides paralegal assistance to attorneys engaged in civil, criminal, or administrative law in the ~~Chief Prosecutor's Office~~ or South Coast AQMD General Counsel's Office. The Paralegal class is distinguished from the legal clerical classes by its responsibility for conducting legal research and analyzing legal opinions and rulings as required in the preparation and conduct of litigation proceedings, as well as responsibility to implement the Minor Source Penalty Assessment Program.

ESSENTIAL DUTIES:

Researches and analyzes law sources such as rules, regulations, statutes, ordinances, court decisions, legal documents and articles for use in preparing legal documents such as briefs, pleadings, contracts, opinions, etc., for review, approval, and use by an attorney.

Drafts motions, memoranda of points and authorities, interrogatories and answers, complaints and answers, crossclaims, affidavits and declarations.

Analyzes and summarizes legislative bills and researches legislative history for determination of legislative intent, sources of law and systems by which laws are administered.

Organizes and indexes trial documents, prepares exhibits and assists attorneys at trial and administrative hearings by keeping track of exhibits, testimony, and documents.

Reviews the Minor Source Penalty Assessment Program guidelines and predetermined penalties to establish and recommend fines to be imposed upon the violator.

Notifies the violator, by mail or otherwise, of South Coast AQMD's offer to process the violation through the Minor Source Penalty Assessment Program and of the recommended settlement.

Conducts conferences with the violator, defense or prosecuting attorneys or other representatives, in order to review and explain the Notice of Violation case elements. South Coast AQMD policies and procedures, and to answer questions; evaluates mitigating circumstances which may be presented and within guidelines, recommends settlements and makes arrangements for payment.

Tracks fine payment schedules and follows up on delinquent payments; tracks statutes of limitations on in house cases.

Reviews legal documents and forms for completeness and conformance to specific requirements set forth in applicable legal codes.



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Gathers factual information and performs routine legal research to assist an attorney in determining appropriate legal action.

Summarizes, organizes, and indexes prior opinions, testimony, depositions, documentary material from interrogatories and abstracts.

MINIMUM REQUIREMENTS

Education and Experience:

-EITHER-

Successful completion of a Certificated Paralegal Program approved by the American Bar Association or graduation from a recognized law school AND two years of experience in a law office or governmental legal agency performing paralegal duties that demonstrates possession of the knowledges and abilities listed as minimum requirements or eighteen months of full-time experience performing paralegal duties for South Coast AQMD.

- OR II -

Four years of training or experience in a law office performing paralegal duties that demonstrate possession of the knowledges and abilities listed as minimum requirements. Legal/paralegal courses or training may be substituted for up to two years of the required experience at the rate of three semester or four and one-half quarter units for one month of experience. Civil law paralegal experience is preferred, but not required.

KNOWLEDGE OF: Principles, concepts, and methodology of legal research, discovery and fact investigation; legal principles and practices; legal terminology; principles of legal writing; civil and criminal legal processes; content and language requirements of legal documents, such as pleadings, briefs, ordinances and depositions; principles of effective interviewing methods and techniques; oral and written communication methods and techniques.

ABILITY TO: Identify, evaluate and extract pertinent information from a wide variety of sources in the preparation of cases and legal documents; use judgment in analyzing complex issues and determining alternate courses of action to obtain required information; analyze and apply established guidelines to case elements, pertinent codes, laws, ordinances, and statutes to violators and/or counsel in order to reach settlement agreements and/or compliance; extract and organize information from diverse, complex and obscure sources including files, depositions, or other evidentiary material; develop and refine content and language of legal documents such as affidavits, declarations, complaints, motions, petitions, interrogatories and accounts, or assist an attorney in performing such work; establish and maintain effective working relationships with South Coast AQMD personnel, governmental and judicial agencies, and others contacted in the course of performing duties and responsibilities.



July 2023

FLSA: Non-Exempt

SENIOR PARALEGAL

DEFINITION: Under general supervision, coordinates, reviews, and participates in the work of legal research support staff in the ~~Chief Prosecutor's~~ General Counsel's Office; prepares, and assists others in preparing exhibits and witnesses for trial and appearance before the Hearing Board; analyzes existing information regarding the cases at hand; provides support services in the preparation, processing, and assessment of civil penalties to negotiate settlements; and researches pertinent case laws; researches and develops legal documents; and does other work as required.

CLASSIFICATION STANDARDS: This ~~single position journey~~ class reports to the Chief ~~Prosecutor~~ Deputy Counsel and is responsible for coordinating, reviewing, and prioritizing the work of paralegals, law clerks, and student interns assigned to assist attorneys in pretrial and trial preparation. In addition, the incumbent performs the more difficult paralegal assignments and evaluates, develops, and modifies policies, procedures, and work methods for legal research support staff. This class is further characterized by the responsibility to review and recommend settlements that fall within the Minor Source Penalty Assessment Program guidelines.

ESSENTIAL DUTIES

Coordinates, reviews, and prioritizes the work of paralegals, law clerks, and student interns assigned to assist attorneys in pretrial and trial preparation, and reviews their work to ensure accuracy, completeness, and adherence to court rules and attorney's instructions; provides technical assistance to subordinate staff.

Completes the more difficult technical projects assigned by the Chief ~~Prosecutor~~ Deputy Counsel and attorney staff, including researching and analyzing rules, regulations, statutes, ordinances, court decisions, legal documents, and articles for use in preparing legal documents, such as briefs, pleadings, contracts, opinions, etc., for review, approval, and use by an attorney.

Drafts motions, memoranda of points and authorities, interrogatories, and answers; reviews complaints and answers, cross-claims, affidavits, and declarations.

Analyzes and summarizes the most complex legislative bills and researches legislative history for determination of legislative intent, sources of law, and judicial systems by which laws are administered.

Organizes and indexes trial documents; prepares exhibits and assists attorneys, at trials and administrative hearings, by keeping track of exhibits, testimony, and documents.

Gathers detailed factual information and performs complex legal research to assist attorneys in determining appropriate legal actions and summaries; organizes and indexes prior opinions, testimony, depositions, and documentary material from interrogatories and abstracts.

Evaluates, develops, and modifies policies, procedures, and work methods for legal research support staff.

Plans, prioritizes, assigns, supervises, and reviews the activities of the staff engaged in the review, preparation, and processing of settlement agreements.

Coordinates, reviews, and makes recommendations on settlements that fall within the Minor Source Penalty Assessment Program's established guidelines.

Reviews the Minor Source Penalty Assessment Program guidelines and predetermined penalties to establish and recommend fines to be imposed upon the violator.

Coordinates or conducts the research of the case disposition statistics and other case-related information for special administrative reports and projects.

Conducts conferences with the violator, defense or prosecuting attorneys or other representatives, in order to review and explain the Notice of Violation case elements, South Coast AQMD policies and procedures, and to answer questions.

MINIMUM REQUIREMENTS

Experience:

EITHER I

One year of experience in the class of Paralegal.

-OR II-

Successful completion of a paralegal certificate program approved by the American Bar Association or graduation from an accredited law school AND three years of experience in a law office or governmental legal agency performing paralegal duties.

KNOWLEDGE OF: Principles and practices of supervision; principles, concepts, and methodology of legal research, discovery, and fact-finding investigation; legal principles and practices; legal terminology; principles of legal writing; civil and criminal legal processes; content and language requirements of legal documents, such as pleadings, briefs, ordinances, and depositions; principles of effective interviewing methods and techniques; oral and written communication methods and techniques.

ABILITY TO: Coordinate, review, and prioritize the work of para-professional staff; train and evaluate staff; identify, evaluate, and extract pertinent information from a wide variety of sources in the preparation of cases and legal documents; use judgment in analyzing complex issues and determining alternate courses of action to obtain required information; analyze and apply established guidelines to case elements, pertinent codes, laws, ordinances, and statutes to violators and/or counsel in order to reach settlement agreements and/or compliance; communicate effectively orally and in writing; develop and refine content and language of legal documents, such as affidavits, declarations, complaints, motions, petitions, and interrogatories or assist an attorney in performing such work; understand and apply South Coast AQMD policies, rules, and regulations; assist in the evaluation of work performance of subordinate personnel; establish and maintain effective working relationships with South Coast AQMD personnel and others contacted in the course of work; apply established guidelines to case elements and South Coast AQMD Rules, policy and procedures to violators and/or counsel in order to reach an agreed settlement-



INVESTIGATOR

DEFINITION: Under direction of a Supervising Investigator, provides investigative services within the ~~Legal Department~~Office of Compliance and Enforcement, in the review, preparation, and processing of Notices of Violation ~~for and~~ criminal prosecution, and civil and mutual settlement agreements referrals; and does other work as required.

CLASSIFICATION STANDARDS: This multi-position class is the journey-level class of the Investigator series. Incumbents of this class may also come from the journey-level Inspector classification. This class requires ~~the complete~~ understanding of the principles, practices, and methods necessary to review, research, prepare, and process ~~Notice of Violation cases~~ enforcement matters for civil and criminal prosecution, and civil and mutual settlement agreements. Incumbents of this class are required to independently perform a variety of assignments of a broad scope under direction.

ESSENTIAL DUTIES:

Reviews field inspection and supplemental reports to ensure the sufficiency and validity of information concerning ~~the Notice of Violation enforcement matters~~; researches permit variances, permit regulations, and other South Coast AQMD data to ensure the sufficiency and validity of information supporting the violation; conducts inquiries, obtains and compiles records and information from a variety of sources to verify the elements of the violation and to support civil or criminal prosecution, and civil and mutual settlement agreements; determines the status of companies in noncompliance and/or corroborates compliance attainment through field inspections or assigned field observations.

~~Reviews the Mutual Settlement Agreement program guidelines and predetermined penalties to establish and recommend fines to be imposed upon the violator.~~

~~Notifies the violator, by mail, of South Coast AQMD's offer to process the violation through the Mutual Settlement Agreement program and of the recommended settlement.~~

~~Conducts conferences with the violator, defense or prosecuting attorneys or other representatives, in order to review and explain the Notice of Violation case elements. South Coast AQMD policies and procedures, and to answer questions; evaluates mitigating circumstances which may be presented and, within the guidelines, recommends settlements and makes arrangements for payment.~~

~~Processes the necessary legal paperwork between South Coast AQMD and court jurisdiction where the violation occurred, in order to obtain a summons and arraignment for prosecution.~~ an inspection warrant.

~~May represent~~ appear on behalf of the South Coast AQMD at hearings, arraignments, pretrials, and trials; presents information and data on businesses cited for violating South Coast AQMD rules and regulations, and state and federal laws controlling air quality standards.

Attends arraignments, pretrial and trial settings, and assists attorneys in developing and preparing civil and criminal cases for prosecution; explains methods of air contaminant emission controls and may provide South Coast AQMD's recommendations concerning the extent of penalties to the court; ~~on~~



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approval of management staff, may process cases which are to be dispositioned through civil compromise.

Coordinates communication and operations with outside governmental agencies for enforcement, investigation, or informational purposes.

May provide procedural guidance or assist in the training of new employees; may assign and coordinate the work of a small clerical unit.

MINIMUM REQUIREMENTS

Education and Experience:

EXPERIENCE: One year of experience in the class of Air Quality Inspector II or two years of civil and/or criminal investigative experience with a public law enforcement agency.

EDUCATION: Completion of at least 34 semester (51 quarter) units of core courses from an accredited college or university, preferably in an academic discipline related to the assigned office/division area of specialization.

KNOWLEDGE OF: Principles and practices of investigative techniques; principles, practices, and methods of case research, and review and preparation for civil and criminal processing; principal sources of information required to support civil and criminal prosecution; functions of judicial agencies; filing and courtroom procedures; principles of effective interviewing methods and techniques; oral and written communication methods, and techniques required to obtain from and provide information to recalcitrant businesses and individuals.

ABILITY TO: Review field inspection reports; identify and compile documentation required to prepare and verify case elements, and support civil and criminal prosecution; ~~apply established guidelines to case elements and South Coast AQMD policy and procedures to violators, and/or counsel in order to reach an agreed settlement;~~ prepare and maintain concise and accurate records, files, and reports; establish and maintain effective working relationships with South Coast AQMD personnel, governmental and judicial agencies, and others contacted in the course of the work.



September 2023

FLSA: Non-Exempt

SUPERVISING INVESTIGATOR

DEFINITION: Under general direction of ~~the Investigations~~ a Senior Enforcement Manager, plans, assigns, coordinates, and reviews the work of staff providing investigative support services to ~~the Chief Prosecutor's Office, of Compliance and Enforcement and the South Coast AQMD Counsel's Office and to the Enforcement Division~~ in the preparation and processing of Notice of Violation cases enforcement matters for civil and criminal prosecution, and civil; and does other work as required.

CLASSIFICATION STANDARDS: This multi-position class is the supervisory-level class of the Investigator series and reports to the Investigations a Senior Enforcement Manager for policy and program direction. Incumbents of this class may also come from the lead or journey-level Inspector classification. This class is characterized by the responsibility for supervising, assigning, prioritizing, and reviewing the ~~processing of Notice of Violation cases~~ investigation of enforcement matters.

ESSENTIAL DUTIES

Participates in the selection of staff; provides or coordinates staff training; works with employees to correct deficiencies; implements discipline procedures.

Plans, prioritizes, assigns, supervises, and reviews the activities of staff engaged in the review, preparation, and ~~processing of Notice of Violation cases~~ investigation of enforcement matters for civil and criminal prosecution, or civil and criminal referrals.

Prioritizes the assignment of ~~cases~~ enforcement matters to balance workloads and ensure the timely completion of cases; adjusts work schedules and assignments to enhance the efficiency and effectiveness of staff activities.

~~Coordinates, reviews, and makes recommendations on settlements which fall within the program's established guidelines.~~

Reviews, recommends, and implements policies and procedures in ~~processing cases~~ investigating enforcement matters and improving the operational activities of the unit.

Trains and assists in the evaluation of staff performance in ~~cases~~ the investigation of enforcement matters, and the application of South Coast AQMD regulations, rules, and guidelines; provides technical expertise on reference sources, case strategies, and courtroom procedures.

Conducts conferences with a variety of legal representatives, and public and private agency officials to interpret and discuss South Coast AQMD rules; provides information on South Coast AQMD policies and procedures, and answers questions on case-related information.

Supervises and reviews field investigations and supplemental reports to ensure the sufficiency and validity of information concerning Notices of Violation; researches permit variances, permit regulations, and other South Coast AQMD data to ensure the sufficiency and validity of information supporting the violation; conducts inquiries, and obtains and compiles records and information from a variety of

sources to verify the elements of the violation, and to support civil and criminal prosecution and mutual settlement agreements; determines the status of companies in noncompliance through field inspectors or assigned field observations.

~~Reviews the Mutual Settlement Agreement Program guidelines and predetermined penalties to establish and recommend fines to be imposed upon violators.~~

Coordinates or conducts the research of case disposition statistics and other case-related information for special administrative reports and projects.

~~Assists prosecution compliance staff and attorneys in developing and preparing civil and criminal cases and criminal referrals; explains methods of air contaminant emission controls and may provide the South Coast AQMD recommendations concerning the extent of penalties to the court; with approval of management staff, may process cases which are to be dispositioned through civil compromise.~~

~~May act for the Investigations Manager in the absence of the incumbent.~~

MINIMUM REQUIREMENTS

Experience and Education:

EXPERIENCE: Two years of experience in the class of Investigator, or three years of civil and/or criminal investigative experience with a public law enforcement agency, or two years of experience conducting a variety of journey-level commercial and industrial air pollution control inspections.

-AND-

EDUCATION: Completion of at least 34 semester (51 quarter) units of core courses from an accredited college or university, preferably in an academic discipline related to the assigned office/division area of specialization.

SUBSTITUTION: Graduation from an accredited college or university with a bachelor's degree, preferably with a major in an academic discipline related to the assigned office/division area of specialization; may substitute for six months of the required experience.

KNOWLEDGE OF: Principles of supervision, training and performance appraisal; principles and practices of investigative techniques; principles, practices and methods of research, review and preparation of civil and criminal cases; recordkeeping systems and equipment; the principal sources of information required to support criminal prosecution; functions of judicial agencies; filing and courtroom procedures; principles of effective interviewing methods and techniques; oral and written communication methods and techniques required to obtain from and provide information to uncooperative individuals.

ABILITY TO: Supervise, organize, and review the work of professional, technical, and clerical personnel; assign and coordinate the work of staff engaged in the revision, preparation, and processing of civil and criminal cases; lead staff in the application of rules, regulations, statutes, and guidelines; analyze and interpret case-related information and complex problems; develop alternatives and recommend effective courses of action; review field inspection reports; identify and compile documentation required to prepare and verify case elements and support criminal prosecution; apply established guidelines to case elements and South Coast AQMD policy and procedures to violators and/or counsel in order to reach an

agreed settlement; prepare clear and comprehensive reports; establish and maintain cooperative relations with a variety of South Coast AQMD personnel, attorneys, and public and private agency officials.

ATTACHMENT C

Amendments to Section 53 of the Salary Resolution and Appendices A and B of the MOU between South Coast AQMD and Teamsters Local 911

Title [Position numbers]	Current Bi-Weekly Salary Range	Proposed Bi-Weekly Salary Range
Deputy Board Clerk II (revising, Deputy Clerk/Transcriber) [0163, 0163,0169]	\$1,920.33 - \$2,599.63	\$2073.95 - \$2,807.60
Senior Deputy Board Clerk (revising, Senior Deputy Clerk) [0162]	\$2,106.35 - \$2,850.88	\$2,274.86 - \$3,078.96
Paralegal [1403, 1019]	\$2,465.72 - \$3,337.91	\$3,088.50 - \$4,179.63
Senior Paralegal [0940]	\$2,678.55 - \$3,625.94	\$3,286.82 - \$4,449.20
Supervising Air Quality Inspector [130, 0406, 0481, 0453, 0526, 0733, 0915, 0550, 0500, 0499, 1088 ,0405, 1192, 1169 ,0428, 0498, 0549, 1687]	\$3,214.26 - \$4,351.42	\$3,286.82 - \$4,449.20

ATTACHMENT D

Amendments to FY 2023-24 Budget

DIVISION	ADD	DELETE
General Counsel	1 – Contracts Assistant	
General Counsel	1 – Senior Paralegal	
General Counsel		2 – Investigators (ID #1233, #1234)