

Civil Service Commission



Jed Nicholson *Commission President, District 1*

Lesley Santos *District 2*

Erica Flores Baltodano *Commission Vice President, District 3*

David Warren *District 4*

Robert Bergman *District 5*

Tami Douglas-Schatz *Commission Secretary*

AGENDA

County of San Luis Obispo Civil Service Commission Regular Session Meeting

Wednesday, September 27, 2023 @ 9:00 a.m.

1055 Monterey Street, Suite D-271, San Luis Obispo, CA 93408

1. Call to Order / Flag Salute / Roll Call

2. Public Comment Period

Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the President. Presentations are limited to three minutes per individual.

3. Minutes

The following draft minutes are submitted for approval:

- a. August 23, 2023

4. Reports

Commission President
Commission Counsel
Commission Outside Counsel
Commission Secretary

5. Request to Approve Revised Job Specification(s):

- a. Legal Clerk, Legal Clerk–Confidential, and Supervising Legal Clerk

6. Public Comment on Closed Session Item

Members of the public wishing to address the Civil Service Commission on Closed Session matters agendized here may do so when recognized by the President. Presentations are limited to three minutes per individual.

7. CLOSED SESSION: Conference with County Labor Negotiator regarding Civil Service Rule Update. (Gov Code Section 54957.6): Agency designated representative: Tami Douglas-Schatz, or designee

8. Adjournment

Civil Service Commission



Jed Nicholson *Commission President, District 1*

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Minutes

County of San Luis Obispo Civil Service Commission

Regular Session Meeting

Wednesday, August 23, 2023 @ 9:00 a.m.

1055 Monterey Street, Suite D-271, San Luis Obispo, CA 93408

Present: Commissioners: President Nicholson, Vice President Baltodano, Commissioner Bergman, Commissioner Santos, Commissioner Warren

Staff: Commission Secretary Tami Douglas-Schatz
Commission Clerk Shaley Salsbury

County Counsel: Jon Ansolabehere

Outside Counsel: Steve Simas

Absent: None

1. Call to Order / Flag Salute / Roll Call

Commission Vice President Baltodano called the meeting to order at 9:01am and led the flag salute. Roll was called. Commission President Nicholson was absent at roll call but arrived at 9:05 following item 4.

2. Public Comment Period

Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the Vice President. Presentations are limited to three minutes per individual. There were no public comments.

3. Minutes

The following draft minutes are submitted for approval:

- a. July 26, 2023

Civil Service Commission

36 The minutes for July 26, 2023, were considered. Vice President Baltodano invited public
37 comment; there was none. Commissioner Bergman motioned to approve the minutes as
38 presented. Commissioner Warren seconded the motion. The motion to approve the minutes
39 as presented carried 4-0-1.
40

41 4. Reports

42 **Commission Vice President** – None

43 **Commission Counsel** – None

44 **Commission Outside Counsel** - None

45 **Commission Secretary** – None
46

47 5. Request to Approve New Job Specification(s):

- 48 a. Enterprise Architect
49

50
51 Human Resources Analyst Stephanie Nute introduced the new proposed specification with
52 Director of Information Technology and Chief Information Officer, Daniel Milei. Ms. Nute
53 provided background information on the changes within both the Information Technology
54 Department (ITD) and the technology field. Ms. Nute explained that the adoption of this new
55 specification would, in accordance with a 2018 Board of Supervisors decision, replace the
56 currently vacant Department Automation Specialist I/II/III position within the Information
57 Technology Department. Commissioner Baltodano suggested substitution of the word
58 “business” used throughout the specification to clarify the intention to serve unpaid clients: the
59 County departments. “Organizational goals” and “organization” were suggested to replace
60 “business” throughout the specification. President Nicholson invited public comment. Teresa
61 Schultz, Senior Labor Representative with SLOCEA, reiterated that there would be no layoffs
62 due to a transition between the Department Automation Specialist I/II/III and the addition of
63 this classification. There were no additional public comments. Commissioner Bergman
64 motioned to approve the new specification as amended. Commissioner Baltodano seconded
65 the motion. The motion to approve as amended carried 5-0-0.
66

67 7. Public Comment on Closed Session Item

68 Members of the public wishing to address the Civil Service Commission on Closed Session
69 matters agendized here may do so when recognized by the President. Presentations are limited
70 to three minutes per individual.
71

72 Hearing no public comment, President Nicholson moved to Closed Session.
73

74 8. CLOSED SESSION: Conference with County Labor Negotiator regarding Civil Service Rule 75 Update. (Gov Code Section 54957.6): Agency designated representative: Tami Douglas- 76 Schatz, or designee 77

78 President Nicholson stated that there was no reportable action in Closed Session.
79
80

Civil Service Commission

81 **9. Adjournment**

82
83 President Nicholson adjourned the meeting at 10:07 a.m.

84
85 **** Note: These minutes reflect official action of the Civil Service Commission. A digital record exists***
86 ***and will remain as the official, complete record of all proceedings by the Civil Service Commission.***

DRAFT



COUNTY OF SAN LUIS OBISPO
DEPARTMENT OF HUMAN RESOURCES

Tami Douglas-Schatz *Director*

TO: Civil Service Commission

DATE: September 27, 2023

FROM: Michael Hobbs, Principal Human Resources Analyst

SUBJECT: Revised Classifications: Legal Clerk, Legal Clerk – Confidential, Supervising Legal Clerk I, and Supervising Legal Clerk II revised to Legal Clerk I, Legal Clerk II, Legal Clerk III, Legal Clerk I – Confidential, Legal Clerk II – Confidential, Legal Clerk III – Confidential, and Supervising Legal Clerk

Departments: County Counsel's Office, Department of Child Support Services, Department of Social Services, District Attorney's Office, Probation Department, Public Works Department, Sheriff's Office

Appointing Authorities: Rita Neal, County Counsel; Natalie Walter, Child Support Services Director; Devin Drake, Social Services Director; Dan Dow, District Attorney; Robert Reyes, Chief Probation Officer; John Diodati, Public Works Director; Ian Parkinson, Sheriff-Coroner

RECOMMENDATION

It is recommended that the Commission approve the proposed revisions to the Legal Clerk classifications by updating the specification language, expanding the current Legal Clerk classification to a Legal Clerk

I/II/III class series, and condensing the current Supervising Legal Clerk I and Supervising Legal Clerk II classifications into a single Supervising Legal Clerk classification.

BACKGROUND

The County currently has four Legal Clerk classifications: Legal Clerk, Legal Clerk – Confidential, Supervising Legal Clerk I, and Supervising Legal Clerk II. The Department of Social Services presented the Human Resources Department with a request to change their Legal Clerk and Supervising Legal Clerk I and II classifications into department specific classifications of Social Services Legal Specialist I, II, III, and Supervising Social Services Legal Specialist. Human Resources conducted a detailed study of this request, which included interviews with department employees in the Legal Clerk classifications; multiple meetings with the Social Services Director and Deputy Director; review of written documentation provided by the department, including details of the duties of incumbents, proposed definitions and duties the new classifications, and a comparison of the current duties of incumbents and proposed job duties to the existing Legal Clerk specifications; and market analysis. The results of the study are that the existing Legal Clerk and Supervising Legal Clerk I and II classifications are still the appropriate classifications for the Department of Social Services.

In addition to the Department of Social Services, the Legal Clerk classifications are also utilized in County Counsel's Office, the Department of Child Support Services, the District Attorney's Office, the Probation Department, the Public Works Department, and the Sheriff's Office. Human Resources' study also considered how Legal Clerks in each of these departments function and how changing the Legal Clerk classifications for one department would impact other departments. Each of these departments use the Legal Clerk classifications somewhat differently based on their specific operations, as is common for classifications utilized in multiple departments. Human Resources determined that the Legal Clerk classifications are still broad enough to encompass the range of duties of the Legal Clerk positions in each of the departments. Maintaining consistent classifications County-wide is the most appropriate approach as it ensures salary parity among employees in these classifications, allows employees to laterally transfer between departments, and is consistent with Commission direction and best practice to not unnecessarily create different classifications with similar duties for different departments. Each

department may have position duty statements specific to their shared classifications so long as the duties of the incumbents in those classifications are not in conflict with the classification specifications.

However, based on Human Resources' study, discussions with the various departments, and analysis of Social Services' specific request, a shared need was identified to modify the Legal Clerk specifications language to accurately describe the positions, duties, and qualifications; expand the current Legal Clerk classification into a Legal Clerk I/II/III class series; and to combine the current Supervising Legal Clerk I and II classifications into a single Supervising Legal Clerk classification. These revised classifications will continue to remain County-wide classifications shared by different departments.

DISCUSSION

Expanding the Legal Clerk classification into a Legal Clerk I/II/III career series creates a new entry-level position to hire less experienced staff, which would aid in recruitment efforts. It also creates an advanced-journey position for experienced and highly skilled staff to handle more advanced tasks, operate more independently, and act as lead workers to lower-level staff. Combining the current Supervising Legal Clerk I and II into a single Supervising Legal Clerk classification creates efficiencies for departments as there is no need for multiple supervisory levels, and it more clearly distinguishes between the true supervisory level and the advanced/lead level. The new career series and single supervisory level are also more consistent with other career series classifications and supervisory classifications in the county.

Multiple discussions were held with each impacted department to ensure that the changes would meet each of their needs. Below is a summary of the recommended changes.

- Create a new entry-level Legal Clerk I classification. This will allow departments to hire less experienced employees and then develop and prepare them for the higher levels of the class series. Currently departments are limited to hiring experienced employees and creating an entry-level classification will aid with recruitment efforts. This also provides an additional hiring option for departments who may not have a need to hire new staff at the journey or advanced levels.
- Retitle the existing Legal Clerk classification as the Legal Clerk II classification. This is the journey level of the classification series.

- Eliminate the current Supervising Legal Clerk I classification and create a new Legal Clerk III. The Legal Clerk III will be the advanced journey level of the class series. Employees in this level may act in a lead or training capacity to other Legal Clerks or clerical staff, will operate more independently than the Legal Clerk I and Legal Clerk II, and will handle the most advanced duties.
- Retitle the existing Supervising Legal Clerk II classification into the new Supervising Legal Clerk classification. This classification is separate from the new Legal Clerk I/II/III class series. Employees in the new Supervising Legal Clerk classification will primarily act as supervisors to departments' legal clerical staff. Departments currently use the Supervising Legal Clerk I and II classifications differently. Some employees in the Supervising Legal Clerk I classification only act in a lead capacity but not as true supervisors. Other departments do not use the Supervising Legal Clerk I classification and place all of their supervisors into the Supervising Legal Clerk II classification or use Supervising Legal Clerk I's as supervisors, but on a more junior level. This change will ensure consistency in the supervisory structure among all departments.
- Update the specifications to ensure accurate descriptions of the positions, duties, and qualifications, as the descriptions and duties have not been revised since 2003. The minimum qualifications of the new Legal Clerk II, Legal Clerk III, and Supervising Legal Clerk are similar to the minimum qualifications of the current Legal Clerk, Supervising Legal Clerk I, and Supervising Legal Clerk II respectively.

A Confidential Legal Clerk classification also exists and is used in the County Counsel's Office. The recommended changes described above for the Legal Clerk I/II/III classifications will also apply to the Confidential classification.

Attached are redline and clean versions of the recommended changes. These changes are not expected to impact reporting relationships or organizational structures, however sample organizational charts for the District Attorney's Office and the Probation Department (with employee names redacted) are attached as examples.

RESULT

The proposed changes to the Legal Clerk classifications address departments' needs by creating a new entry-level classification to hire less experienced employees, creating a new advanced journey level, and

creating a more efficient and consistent supervisory structure. The specification updates ensure that the duties and qualifications for the classifications are accurately described. The continued approach of using the same Legal Clerk classifications countywide ensures consistent compensation for employees and allows employees to transfer laterally between departments. There will be no negative impacts to incumbents currently in the Legal Clerk and Supervising Legal Clerk I and II classifications.

OTHER AGENCY INVOLVEMENT

The County Counsel's Office, Department of Child Support Services, Department of Social Services, District Attorney's Office, Probation Department, Public Works Department, and Sheriff's Office were all involved in the development of these proposed changes and concur with the specifications as proposed. These revisions were also reviewed by the San Luis Obispo County Employees Association (SLOCEA), which represents employees in the Legal Clerk classifications.

Attachments:

1. Legal Clerk I/II/III redline version
2. Legal Clerk I/II/III clean version
3. Legal Clerk I/II/III – Confidential redline version
4. Legal Clerk I/II/III – Confidential clean version
5. Supervising Legal Clerk redline version
6. Supervising Legal Clerk clean version
7. District Attorney's Office Organizational Chart
8. Probation Department Organizational Chart

HUMAN RESOURCES DEPARTMENT

County of San Luis Obispo ~~County~~

LEGAL CLERK I/II/III

(Class Series)

DEFINITION:

Under close or general supervision, performs specialized clerical work of a legal nature. ~~where the majority of tasks are completed for attorneys, the courts or the criminal justice system demonstrating proficiency on a wide variety of office equipment; may act as a leadworker and assist in the training of other staff; and does other related work as required.~~

DISTINGUISHING CHARACTERISTICS:

This is a class series. Incumbents within the series are considered for promotion to a higher class based upon development of the more advanced requisite knowledge, skills and abilities and successful completion of progressively more difficult and complex duties and assignments.

Legal Clerk I: This is the entry level in the series. Incumbents work under close supervision and perform routine clerical duties of a legal nature.

Legal Clerk II: This is the journey level in the series. Incumbents work under supervision and apply specialized legal knowledge and skills in support of State and Federal regulations, mandates, and County and department policies and procedures. The incumbent can execute all but the most complex tasks with minimal training or oversight. May assist in the training of other staff and lead projects as assigned.

Legal Clerk III: This is the advanced journey level in the series. Incumbents at this level work independently under general supervision, with minimal oversight. Incumbents have extensive experience and exercise a high level of autonomy in applying specialized knowledge and skills in support of State and Federal regulations, mandates, and County and department policies and procedures. Incumbents are assigned the

most complex assignments. May act as a lead worker by training and directing the work of other legal clerks or clerical staff.

REPRESENTATIVE DUTIES:

(Not in order of importance)

- Transcribes dictation involving legal terminology from civil or criminal legal forms;
- typesPrepares various legal documents and forms on word processors, such asincluding complaints, briefs, motions, agreements, resolutions, ordinances, opinions, subpoenas, contracts, extradition forms, information, indictments, jury instructions, and verdicts; types letters, memos and reports from dictated notes, tapes, rough drafts, or oral instructions; types materials from straight or clean copy, inserting and deleting specific information; types standard forms; transcribes civil or criminal legal forms from a dictating machine;
- composesPrepares letters and memoscorrespondence for use in court, legal proceedings, or for other legal matters. from general oral or written instructions; composes form letters;
- Gathers information and compiles and types simple and complex periodic reports;
- Reviews and finalizes legal pleadings, correspondence, or other documents for filing or transmission to others.
- Provides information to other staff and partner agencies regarding legal mandates, regulations, and department policies and procedures.
- Maintains office calendars reflecting court dates, public, agency, and office meetings, and enters and deletes court or agency filings; may file extensions for documents dueinformation on to the court calendars;f
- Files legal documents with the County Clerk, or with the courts, or other agencies;e
- Ensures timely processing and completion of documents in compliance with court rules and procedures;v
- Verifies accuracy of citations by comparing with legal reference materialsbooks;
- places telephone calls to obtain orObtains and verifiesy information, maintaining confidentiality regarding attorney-client communications;
- greetsthe public by, answering questions and explaining procedures;m
- May receive and process payments, and prepare receipts for payment of fees, post payments to ledgers;g

Attachment 1

- Gathers files and other information based on court calendars.
- Liases with department attorneys or legal staff, County Counsel attorneys, or third-party attorneys.
- Creates and maintains ~~sets up new~~ case files, and other files of a legal nature.
- Keeps abreast of legislation affecting legal procedures and county and special districts' organization.
- Operates a variety of office ~~automation~~ equipment, ~~which may include word processors, microcomputers, on-line terminals, copiers, optical scanners, telecopiers and teletype equipment.~~
- Uses computers and related technology efficiently.
- Performs other related duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern ~~o~~ office practices and procedures;
- Proper telephone ~~procedures and~~ etiquette;
- Alphabetical, numerical, and chronological sequences used in filing;
- Correct spelling, grammar, punctuation, and English usage;
- Legal procedures, legal terminology, and legal formats, including briefs, motions, opinions, resolutions, and subpoenas, etc.; ~~proper telephone procedures;~~
- ~~basic~~ Fundamental mathematical concepts.

Ability to:

- Learn ~~applicable State and Federal regulations, mandates, and~~ departmental policies, procedures and organization;
- Perform clerical duties under pressure and with many interruptions;
- Perform basic arithmetic; ~~operate various office machines, including word processing equipment;~~
- Engage with ~~meet~~ the public, courts, other agencies, and public officials with tact and courtesy;
- Keep and maintain clerical records and prepare reports;
- Read and comprehend legal material;
- Follow ~~verbal~~ oral and written instructions;
- Work effectively ~~establish~~ and maintain ~~effective~~ positive working relationships with others, including those of diverse perspectives using interpersonal skills;

- Type at a speed of 50 net wpm;~~t~~
- Take dictation from ~~tapes recordings~~, drafts, ~~orally~~, and verbal instruction convey ideas in written form; organize and compile information into reports;~~e~~
- Communicate effectively, both verbally and in writing, with the public, vendors, peers, subordinates, and other agencies
- Establish good public relations;~~e~~
- Operate ~~a word processor and~~ a variety of ~~other~~ office ~~automation~~ equipment.
- Use computers and related technology efficiently

EDUCATION AND EXPERIENCE:

A combination of education, training, and experience resulting in the required knowledge, skills, and abilities. An example of qualifying education and experience includes:

Either A: Legal Clerk I: ~~One~~Two years of clerical experience in a legal office, court, or criminal justice system;
Or B: ~~o~~One year of experience equivalent to an Administrative Assistant III.

Legal Clerk II: Two years of experience performing increasingly complex legal, court, or legal document preparation work; Or one year of experience equivalent to a Legal Clerk I or Administrative Assistant III.

Legal Clerk III: Three years of experience performing increasingly complex legal, court, or legal document preparation work; Or one year of experience equivalent to a Legal Clerk II.

LICENSES AND CERTIFICATES:

Certain positions within this classification may require driving. When driving is an essential function of the position, a valid CALIFORNIA driver license will be required at the time of appointment and must be maintained throughout employment.

SPECIAL SUBCLASS SELECTIVE RECRUITMENT:

Recruitment for this ~~position classification~~ may be conducted according to the special divisions or programs~~department~~ in which a vacancy exists. and T~~he~~ specialized experience~~requirements~~ of the position ~~will be set forth at the time of recruitment.~~

124
125 This class specification generally describes the duties and responsibilities characteristic of the position(s)
126 within this class. The duties of a particular position within a multi-position class may vary from the duties
127 of other positions within the class. Accordingly, the essential duties of a particular position (whether it be
128 a multi-position class or a single-position class) will be identified and used by medical examiners and hiring
129 authorities in the selection process. ~~This information will also be made available for review at the time of~~
130 ~~any recruitment for that position and at such other times as reasonably required. If you have any questions~~
131 ~~regarding the duties, employment standards, or working conditions of the position, please contact the~~
132 ~~Human Resources Department at 805.781.5959.~~

135 Adopted: 06-25-86

136 Revised: 04-17-95

137 Effective: 04-17-95

138 Revised: 09-24-03

139 04-26-23

140 ~~XX-XX-XX~~

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo**

5 **LEGAL CLERK I/II/III**

6 **(Class Series)**

8 **DEFINITION:**

9 Under close or general supervision, performs specialized clerical work of a legal nature.

11 **DISTINGUISHING CHARACTERISTICS:**

12 This is a class series. Incumbents within the series are considered for promotion to a higher class based
13 upon development of the more advanced requisite knowledge, skills and abilities and successful
14 completion of progressively more difficult and complex duties and assignments.

16 Legal Clerk I: This is the entry level in the series. Incumbents work under close supervision and perform
17 routine clerical duties of a legal nature.

19 Legal Clerk II: This is the journey level in the series. Incumbents work under supervision and apply
20 specialized legal knowledge and skills in support of State and Federal regulations, mandates, and County
21 and department policies and procedures. The incumbent can execute all but the most complex tasks with
22 minimal training or oversight. May assist in the training of other staff and lead projects as assigned.

24 Legal Clerk III: This is the advanced journey level in the series. Incumbents at this level work independently
25 under general supervision, with minimal oversight. Incumbents have extensive experience and exercise a
26 high level of autonomy in applying specialized knowledge and skills in support of State and Federal
27 regulations, mandates, and County and department policies and procedures. Incumbents are assigned the
28 most complex assignments. May act as a lead worker by training and directing the work of other legal clerks
29 or clerical staff.

31 **REPRESENTATIVE DUTIES:**

32 (Not in order of importance)

- 33 • Transcribes dictation involving legal terminology from civil or criminal legal forms.
- 34 • Prepares various legal documents and forms, such as complaints, briefs, motions, agreements,
35 resolutions, ordinances, opinions, subpoenas, contracts, extradition forms, information,
36 indictments, jury instructions, and verdicts.
- 37 • Prepares correspondence for use in court, legal proceedings, or for other legal matters.
- 38 • Gathers information and compiles reports.
- 39 • Reviews and finalizes legal pleadings, correspondence, or other documents for filing or transmission
40 to others.
- 41 • Provides information to other staff and partner agencies regarding legal mandates, regulations, and
42 department policies and procedures.
- 43 • Maintains office calendars reflecting court dates, public, agency, and office meetings, and court or
44 agency filings; may file extensions for documents due to the court.
- 45 • Files legal documents with the County Clerk, with the courts, or other agencies.
- 46 • Ensures timely processing and completion of documents in compliance with court rules and
47 procedures.
- 48 • Verifies accuracy of citations by comparing with legal reference materials.
- 49 • Obtains and verifies information maintaining confidentiality regarding attorney-client
50 communications.
- 51 • Assists the public by answering questions and explaining procedures.
- 52 • May receive and process payments and prepare receipts for payment of fees.
- 53 • Gathers files and other information based on court calendars.
- 54 • Liaises with department attorneys or legal staff, County Counsel attorneys, or third-party attorneys.
- 55 • Creates and maintains case files, and other files of a legal nature.
- 56 • Keeps abreast of legislation affecting legal procedures and county and special districts' organization.
- 57 • Operates a variety of office equipment.
- 58 • Uses computers and related technology efficiently.
- 59 • Performs other related duties as assigned.

60
61 **EMPLOYMENT STANDARDS:**

62 **Knowledge of:**

- 63 • Modern office practices and procedures
- 64 • Proper telephone procedures and etiquette
- 65 • Alphabetical, numerical, and chronological sequences used in filing
- 66 • Correct spelling, grammar, punctuation, and English usage
- 67 • Legal procedures, legal terminology, and legal formats, including briefs, motions, opinions,
68 resolutions, and subpoenas
- 69 • Fundamental mathematical concepts

70
71 **Ability to:**

- 72 • Learn applicable State and Federal regulations, mandates, and departmental policies, procedures
- 73 • Perform clerical duties under pressure and with many interruptions
- 74 • Perform basic arithmetic
- 75 • Engage with the public, courts, other agencies, and public officials with tact and courtesy
- 76 • Keep and maintain clerical records and prepare reports
- 77 • Read and comprehend legal material
- 78 • Follow verbal and written instructions
- 79 • Work effectively and maintain positive working relationships with others, including those of diverse
80 perspectives using interpersonal skills
- 81 • Type at a speed of 50 net wpm
- 82 • Take dictation from recordings, drafts, and verbal instruction
- 83 • Communicate effectively, both verbally and in writing, with the public, vendors, peers, subordinates,
84 and other agencies
- 85 • Establish good public relations
- 86 • Operate a variety of office equipment
- 87 • Use computers and related technology efficiently

88
89 **EDUCATION AND EXPERIENCE:**

90 A combination of education, training, and experience resulting in the required knowledge, skills, and
91 abilities. An example of qualifying education and experience includes:

Attachment 2

93 Legal Clerk I: One year of clerical experience in a legal office, court, or criminal justice system; Or one year
94 of experience equivalent to an Administrative Assistant II.

96 Legal Clerk II: Two years of experience performing increasingly complex legal, court, or legal document
97 preparation work; Or one year of experience equivalent to a Legal Clerk I or Administrative Assistant III.

99 Legal Clerk III: Three years of experience performing increasingly complex legal, court, or legal document
100 preparation work; Or one year of experience equivalent to a Legal Clerk II.

102 **LICENSES AND CERTIFICATES:**

103 Certain positions within this classification may require driving. When driving is an essential function of the
104 position, a valid CALIFORNIA driver license will be required at the time of appointment and must be
105 maintained throughout employment.

107 **SPECIAL SUBCLASS RECRUITMENT:**

108 Recruitment for this classification may be conducted according to the special divisions or programs in
109 which a vacancy exists and the requirements of the position.

111 This class specification generally describes the duties and responsibilities characteristic of the position(s)
112 within this class. The duties of a particular position within a multi-position class may vary from the duties
113 of other positions within the class. Accordingly, the essential duties of a particular position (whether it be
114 a multi-position class or a single-position class) will be identified and used by medical examiners and hiring
115 authorities in the selection process. If you have any questions regarding the duties, employment
116 standards, or working conditions of the position, please contact the Human Resources Department at
117 805.781.5959.

120 Adopted: 06-25-86

121 Revised: 04-17-95

122 Effective: 04-17-95

123 Revised: 09-24-03

124

04-26-23

125

XX-XX-XX

DRAFT

HUMAN RESOURCES DEPARTMENT

County of San Luis Obispo ~~County~~

LEGAL CLERK I/II/III – CONFIDENTIAL

(Class Series)

DEFINITION:

Under close or general supervision, performs specialized clerical work of a legal nature. ~~where the majority of tasks are completed for attorneys, the courts or the criminal justice system demonstrating proficiency on a wide variety of office equipment; may act as a leadworker and assist in the training of other staff; and does other related work as required.~~

Employees in ~~this~~ these confidential classifications contribute to the development or implementation of the County's employee relations policies and/or in the course of their duties have access to information relating to the County's administration of employer employee relations. Under State law and the County Employee Relations Policy, confidential employees have different rights of representation than those of other non-management employees.

DISTINGUISHING CHARACTERISTICS:

This is a class series. Incumbents within the series are considered for promotion to a higher class based upon development of the more advanced requisite knowledge, skills and abilities and successful completion of progressively more difficult and complex duties and assignments.

Legal Clerk I – Confidential: This is the entry level in the series. Incumbents work under close supervision and perform routine clerical duties of a legal nature.

Legal Clerk II – Confidential: This is the journey level in the series. Incumbents work under supervision and apply specialized legal knowledge and skills in support of State and Federal regulations, mandates, and County and department policies and procedures. The incumbent can execute all but the most complex

Attachment 3

31 tasks with minimal training or oversight. May assist in the training of other staff and lead projects as
32 assigned.

33
34 Legal Clerk III – Confidential: This is the advanced journey level in the series. Incumbents at this level work
35 independently under general supervision, with minimal oversight. Incumbents have extensive experience
36 and exercise a high level of autonomy in applying specialized knowledge and skills in support of State and
37 Federal regulations, mandates, and County and department policies and procedures. Incumbents are
38 assigned the most complex assignments. May act as a lead worker by training and directing the work of
39 other legal clerks or clerical staff.

40 **REPRESENTATIVE DUTIES:**

41 (Not in order of importance)

- 42 • Transcribes dictation involving legal terminology ~~from civil or criminal legal forms.;~~
- 43 • typesPrepares various legal documents ~~and forms on word processors, such asincluding~~
44 complaints, briefs, motions, agreements, resolutions, ordinances, opinions, subpoenas, contracts,
45 extradition forms, information, indictments, jury instructions, and verdicts.; ~~types letters, memos~~
46 ~~and reports from dictated notes, tapes, rough drafts, or oral instructions; types materials from~~
47 ~~straight or clean copy, inserting and deleting specific information; types standard forms; transcribes~~
48 ~~civil or criminal legal forms from a dictating machine;~~
- 49 • composesPrepares letters and memoscorrespondence for use in court, legal proceedings, or for
50 other legal matters. from general oral or written instructions; composes form letters;
- 51 • Gathers information and compiles and types simple and complex periodic reports.;
- 52 • Reviews and finalizes legal pleadings, correspondence, or other documents for filing or transmission
53 to others.
- 54 • Provides information to other staff and partner agencies regarding legal mandates, regulations, and
55 department policies and procedures.
- 56 • Maintains office calendars reflecting court dates, public, agency, and office meetings, and enters
57 and deletes court or agency filings; may file extensions for documents dueinformation on to the
58 court calendars.; f
- 59 • Files legal documents with the County Clerk, ~~or~~ with the courts, or other agencies.; e

Attachment 3

- Ensures timely processing and completion of documents in compliance with court rules and procedures.;~~v~~
- Verifies accuracy of citations by comparing with legal reference materialsbooks.;
- ~~places telephone calls to obtain or~~Obtains and verifies information, maintaining confidentiality regarding attorney-client communications.;
- ~~greet~~Assists the public by, answering questions and explaining procedures.;~~m~~
- May receive and process payments, and prepare receipts for payment of fees.;~~post payments to ledgers;~~ g
- Gathers files and other information based on court calendars.;
- Liases with department attorneys or legal staff, County Counsel attorneys, or third-party attorneys.
- Creates and maintains ~~sets up new~~ case files, and other files of a legal nature. f
- ~~Files and deletes supplements in code books.~~ k
- Keeps abreast of legislation affecting legal procedures and county and special districts' organization.;~~o~~
- Operates a variety of office ~~automation~~ equipment, ~~which may include word processors, microcomputers, on-line terminals, copiers, optical scanners, telecopiers and teletype equipment.~~
- Uses computers and related technology efficiently.
- Performs other related duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern ~~o~~office practices and procedures.;~~p~~
- Proper telephone procedures and etiquette.;~~a~~
- Alphabetical, numerical, and chronological sequences used in filing.;~~e~~
- Correct spelling, grammar, punctuation, and English usage.;~~l~~
- Legal procedures.; legal terminology, and; legal formats, including briefs, motions, opinions, resolutions, and subpoenas, ~~etc.;~~ proper telephone procedures;
- basic ~~Fundamental~~ mathematical concepts.

Ability to:

Attachment 3

- Learn applicable State and Federal regulations, mandates, and departmental policies, procedures and organization;~~p~~
- Perform clerical duties under pressure and with many interruptions;~~p~~
- Perform basic arithmetic;~~operate various office machines, including word processing equipment;~~
- Engage with~~meet~~ the public, courts, other agencies, and public officials with tact and courtesy;~~k~~
- Keep and maintain clerical records and prepare reports;~~r~~
- Read and comprehend legal material;~~f~~
- Follow verbal~~oral~~ and written instructions;
- Work effectively~~establish~~ and maintain effective~~positive~~ working relationships with others, including those of diverse perspectives using interpersonal skills;~~t~~
- Type at a speed of 50 net wpm;~~t~~
- Take dictation from ~~tapes~~recordings, drafts, ~~orally;~~ and verbal instruction~~convey ideas in written form;~~ organize and compile information into reports;~~e~~
- Communicate effectively, both verbally and in writing, with the public, vendors, peers, subordinates, and other agencies
- Establish good public relations;~~e~~
- Operate ~~a word processor and~~ a variety of ~~other~~ office ~~automation~~ equipment.
- Use computers and related technology efficiently

EDUCATION AND EXPERIENCE:

A combination of education, training, and experience resulting in the required knowledge, skills, and abilities. An example of qualifying education and experience includes:

Either A: Legal Clerk I – Confidential: One~~Two~~ years of clerical experience in a legal office, court, or criminal justice system; Or B: One~~o~~ year of experience equivalent to an Administrative Assistant III.

Legal Clerk II – Confidential: Two years of experience performing increasingly complex legal, court, or legal document preparation work; Or one year of experience equivalent to a Legal Clerk I or Administrative Assistant III.

Attachment 3

Legal Clerk III – Confidential: Three years of experience performing increasingly complex legal, court, or legal document preparation work; Or one year of experience equivalent to a Legal Clerk II.

LICENSES AND CERTIFICATES:

Certain positions within this classification may require driving. When driving is an essential function of the position, a valid CALIFORNIA driver license will be required at the time of appointment and must be maintained throughout employment.

SPECIAL SUBCLASS SELECTIVE RECRUITMENT:

Recruitment for this ~~position-classification~~ may be conducted according to the special divisions or programs department in which a vacancy exists. ~~and The specialized experience~~ requirements of the position ~~will be set forth at the time of recruitment.~~

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential duties of a particular position (whether it be a multi-position class or a single-position class) will be identified and used by medical examiners and hiring authorities in the selection process. ~~This information will also be made available for review at the time of any recruitment for that position and at such other times as reasonably required. If you have any questions regarding the duties, employment standards, or working conditions of the position, please contact the Human Resources Department at 805.781.5959.~~

Adopted: 06-25-86

Revised: 04-17-95

Effective: 04-17-95

Revised: 09-24-03

04-26-23

XX-XX-XX

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo**

3
4
5 **LEGAL CLERK I/II/III – CONFIDENTIAL**

6 **(Class Series)**

7
8 **DEFINITION:**

9 Under close or general supervision, performs specialized clerical work of a legal nature.

10
11 Employees in these confidential classifications contribute to the development or implementation of the
12 County's employee relations policies and/or in the course of their duties have access to information relating
13 to the County's administration of employer employee relations. Under State law and the County Employee
14 Relations Policy, confidential employees have different rights of representation than those of other non-
15 management employees.

16
17 **DISTINGUISHING CHARACTERISTICS:**

18 This is a class series. Incumbents within the series are considered for promotion to a higher class based
19 upon development of the more advanced requisite knowledge, skills and abilities and successful
20 completion of progressively more difficult and complex duties and assignments.

21
22 Legal Clerk I – Confidential: This is the entry level in the series. Incumbents work under close supervision
23 and perform routine clerical duties of a legal nature.

24
25 Legal Clerk II – Confidential: This is the journey level in the series. Incumbents work under supervision and
26 apply specialized legal knowledge and skills in support of State and Federal regulations, mandates, and
27 County and department policies and procedures. The incumbent can execute all but the most complex
28 tasks with minimal training or oversight. May assist in the training of other staff and lead projects as
29 assigned.

Attachment 4

31 Legal Clerk III – Confidential: This is the advanced journey level in the series. Incumbents at this level work
32 independently under general supervision, with minimal oversight. Incumbents have extensive experience
33 and exercise a high level of autonomy in applying specialized knowledge and skills in support of State and
34 Federal regulations, mandates, and County and department policies and procedures. Incumbents are
35 assigned the most complex assignments. May act as a lead worker by training and directing the work of
36 other legal clerks or clerical staff.

37 38 **REPRESENTATIVE DUTIES:**

39 (Not in order of importance)

- 40 • Transcribes dictation involving legal terminology from civil or criminal legal forms.
- 41 • Prepares various legal documents and forms, such as complaints, briefs, motions, agreements,
42 resolutions, ordinances, opinions, subpoenas, contracts, extradition forms, information,
43 indictments, jury instructions, and verdicts.
- 44 • Prepares correspondence for use in court, legal proceedings, or for other legal matters.
- 45 • Gathers information and compiles reports.
- 46 • Reviews and finalizes legal pleadings, correspondence, or other documents for filing or transmission
47 to others.
- 48 • Provides information to other staff and partner agencies regarding legal mandates, regulations, and
49 department policies and procedures.
- 50 • Maintains office calendars reflecting court dates, public, agency, and office meetings, and court or
51 agency filings; may file extensions for documents due to the court.
- 52 • Files legal documents with the County Clerk, with the courts, or other agencies.
- 53 • Ensures timely processing and completion of documents in compliance with court rules and
54 procedures.
- 55 • Verifies accuracy of citations by comparing with legal reference materials.
- 56 • Obtains and verifies information maintaining confidentiality regarding attorney-client
57 communications.
- 58 • Assists the public by answering questions and explaining procedures.
- 59 • May receive and process payments and prepare receipts for payment of fees.
- 60 • Gathers files and other information based on court calendars.
- 61 • Liaises with department attorneys or legal staff, County Counsel attorneys, or third-party attorneys.

Attachment 4

- 62 • Creates and maintains case files, and other files of a legal nature.
- 63 • Keeps abreast of legislation affecting legal procedures and county and special districts' organization.
- 64 • Operates a variety of office equipment.
- 65 • Uses computers and related technology efficiently.
- 66 • Performs other related duties as assigned.

68 **EMPLOYMENT STANDARDS:**

69 **Knowledge of:**

- 70 • Modern office practices and procedures
- 71 • Proper telephone procedures and etiquette
- 72 • Alphabetical, numerical, and chronological sequences used in filing
- 73 • Correct spelling, grammar, punctuation, and English usage
- 74 • Legal procedures, legal terminology, and legal formats, including briefs, motions, opinions,
75 resolutions, and subpoenas
- 76 • Fundamental mathematical concepts

78 **Ability to:**

- 79 • Learn applicable State and Federal regulations, mandates, and departmental policies, procedures
- 80 • Perform clerical duties under pressure and with many interruptions
- 81 • Perform basic arithmetic
- 82 • Engage with the public, courts, other agencies, and public officials with tact and courtesy
- 83 • Keep and maintain clerical records and prepare reports
- 84 • Read and comprehend legal material
- 85 • Follow verbal and written instructions
- 86 • Work effectively and maintain positive working relationships with others, including those of diverse
87 perspectives using interpersonal skills
- 88 • Type at a speed of 50 net wpm
- 89 • Take dictation from recordings, drafts, and verbal instruction
- 90 • Communicate effectively, both verbally and in writing, with the public, vendors, peers, subordinates,
91 and other agencies
- 92 • Establish good public relations

- Operate a variety of office equipment
- Use computers and related technology efficiently

EDUCATION AND EXPERIENCE:

A combination of education, training, and experience resulting in the required knowledge, skills, and abilities. An example of qualifying education and experience includes:

Legal Clerk I – Confidential: One year of clerical experience in a legal office, court, or criminal justice system; Or one year of experience equivalent to an Administrative Assistant II.

Legal Clerk II – Confidential: Two years of experience performing increasingly complex legal, court, or legal document preparation work; Or one year of experience equivalent to a Legal Clerk I or Administrative Assistant III.

Legal Clerk III – Confidential: Three years of experience performing increasingly complex legal, court, or legal document preparation work; Or one year of experience equivalent to a Legal Clerk II.

LICENSES AND CERTIFICATES:

Certain positions within this classification may require driving. When driving is an essential function of the position, a valid CALIFORNIA driver license will be required at the time of appointment and must be maintained throughout employment.

SPECIAL SUBCLASS RECRUITMENT:

Recruitment for this classification may be conducted according to the special divisions or programs in which a vacancy exists and the requirements of the position.

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential duties of a particular position (whether it be a multi-position class or a single-position class) will be identified and used by medical examiners and hiring authorities in the selection process. If you have any questions regarding the duties, employment

Attachment 4

standards, or working conditions of the position, please contact the Human Resources Department at
805.781.5959.

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04-26-23

xx-xx-xx

DRAFT

HUMAN RESOURCES DEPARTMENT

County of San Luis Obispo County

SUPERVISING LEGAL CLERK II

DEFINITION:

Under direction, supervises the legal clerical staff of a department; ~~performs specialized clerical work of a legal nature where the majority of tasks are completed for attorneys, the courts or the criminal justice system; provides administrative assistance to the department head; and does other related work as required.~~

TYPICAL TASKS/REPRESENTATIVE DUTIES:

(Not in order of importance)

- Coordinates and supervises the work of a clerical staff.~~;~~[;]~~p~~
- Plans and organizes workload and assignments.~~;~~[;]~~€~~
- Coordinates payroll and personnel transactions.~~;~~[;]~~a~~
- Attends and may lead meetings with departmental staff and other departments and agencies.~~;~~[;]~~m~~
- Maintains a working knowledge of the various systems and procedures in the department.~~;~~[;]~~m~~
- May assist in the preparation of the departmental budget.~~;~~[;]
- ~~keeps~~Keeps abreast of legislation affecting legal procedures and county and special districts' organization.~~;~~[;]~~i~~
- Implements and develops new office procedures when as necessary.~~;~~[;]~~t~~
- Trains and evaluates the performance of employees and makes recommendations to appointing authority regarding selection and discipline.~~;~~[;]~~p~~
- Provides assistance to the administrative staff of the department.~~;~~[;]~~g~~
- Gathers information and compiles reports, maintaining confidentiality regarding attorney-client communications.~~;~~[;]~~€~~
- Checks legal references for correct citations.~~;~~[;]~~p~~
- Prepares recommendations for solving various problems, or improving processes.~~;~~[;]~~m~~
- Maintains familiarity with the office equipment in the department.~~;~~[;]~~m~~

- ~~May be required to operate, or may supervise those who operate, one of, various automated office equipment, including word processors, personal computers, data processing equipment, facsimile, electronic copiers, printers, adding machines, calculators and other modern office equipment.;-e~~
- Estimates supply and equipment requirements and maintains inventory of all supplies.
- May perform highly complex and difficult legal clerical work requiring considerable independent judgment as needed.
- Performs other related duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Legal procedures and terminology;
~~— legal terminology; p~~
- Procedures and practices of local, state, and federal courts applicable to job assignment;-c
- Correct English usage, spelling, grammar, and punctuation;-a
- Automated office equipment;-l
- Legal formats, including briefs, motions, opinions, resolutions, subpoenas, etc.;-p
- Proper telephone procedures and etiquette;-b
- Basic math and budgeting principles;-e
- Elements and principles of supervision and training;-r
- Record keeping systems;-c
- Correspondence and report styles and formats.

Ability to:

- Perform highly complex and difficult legal clerical work requiring considerable independent judgment;-convey ideas in written form; organize and compile information into reports;-l
- Communicate effectively, both verbally and in writing, with the public, vendors, peers, subordinates, and other agencies
- Learn to operate automated office equipment;-e
- Establish good public relations;-e
- Operate a word processor and a variety of other office automation equipment;-s
- Use computers and related technology efficiently

- Supervise and direct the activities of one or more sections of the legal clerical staff of the department;~~p~~
- Perform basic arithmetical calculations;~~u~~
- Understand, interpret and appropriately apply interpretation of laws and rules;~~maintain effective working relationships.~~
- Work effectively and maintain positive working relationships with others, including those of diverse perspectives using interpersonal skills such as listening, speaking, advisory, mediation, reconciliation, and consensus-building

EDUCATION AND EXPERIENCE:

A combination of education, training, and experience resulting in the required knowledge, skills, and abilities. An example of qualifying education and experience includes:

~~Either A: Four years of clerical experience in a legal office or court, or one year of of which included supervisory responsibilities; Or B: One year of~~ experience equivalent to a ~~Supervising Legal Clerk I~~ Legal Clerk III.

LICENSES AND CERTIFICATES:

Certain positions within this classification may require driving. When driving is an essential function of the position, a valid CALIFORNIA driver license will be required at the time of appointment and must be maintained throughout employment.

SPECIAL SUBCLASS SELECTIVE RECRUITMENT:

Recruitment for this ~~position-classification~~ may be conducted according to the special divisions or programs~~department~~ in which a vacancy exists and. ~~The specialized experience~~ requirements of the position ~~will be set forth at the time of recruitment.~~

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential duties of a particular position (whether it be a

Attachment 5

94 multi-position class or a single-position class) will be identified and used by medical examiners and hiring
95 authorities in the selection process. ~~This information will also be made available for review at the time of~~
96 ~~any recruitment for that position and at such other times as reasonably required.~~ If you have any questions
97 regarding the duties, employment standards, or working conditions of the position, please contact the
98 Human Resources Department at 805.781.5959.

99
100 Adopted: 09-24-03

101 Revised: 04-26-23

102 XX-XX-XX

DRAFT

HUMAN RESOURCES DEPARTMENT

County of San Luis Obispo

SUPERVISING LEGAL CLERK

DEFINITION:

Under direction, supervises the legal clerical staff of a department.

REPRESENTATIVE DUTIES:

(Not in order of importance)

- Coordinates and supervises the work of a clerical staff.
- Plans and organizes workload and assignments.
- Coordinates payroll and personnel transactions.
- Attends and may lead meetings with departmental staff and other departments and agencies.
- Maintains a working knowledge of the various systems and procedures in the department.
- May assist in the preparation of the departmental budget.
- Keeps abreast of legislation affecting legal procedures and county and special districts' organization.
- Implements and develops new office procedures as necessary.
- Trains and evaluates the performance of employees and makes recommendations to appointing authority regarding selection and discipline.
- Provides assistance to the administrative staff of the department.
- Gathers information and compiles reports, maintaining confidentiality regarding attorney-client communications.
- Checks legal references for correct citations.
- Prepares recommendations for solving various problems or improving processes.
- Maintains familiarity with the office equipment in the department.
- May be required to operate, or may supervise operation of, various office equipment.
- Estimates supply and equipment requirements and maintains inventory of all supplies.
- May perform highly complex and difficult legal clerical work requiring considerable independent

32 judgment as needed.

- 33 • Performs other related duties as assigned.

34
35 **EMPLOYMENT STANDARDS:**

36 **Knowledge of:**

- 37 • Legal procedures and terminology
- 38 • Procedures and practices of local, state, and federal courts applicable to job assignment
- 39 • Correct English usage, spelling, grammar, and punctuation
- 40 • Automated office equipment
- 41 • Legal formats, including briefs, motions, opinions, resolutions, subpoenas, etc.
- 42 • Proper telephone procedures and etiquette
- 43 • Basic math and budgeting principles
- 44 • Elements and principles of supervision and training
- 45 • Record keeping systems
- 46 • Correspondence and report styles and formats

47
48 **Ability to:**

- 49 • Perform highly complex and difficult legal clerical work requiring considerable independent
50 judgment
- 51 • Communicate effectively, both verbally and in writing, with the public, vendors, peers, subordinates,
52 and other agencies
- 53 • Learn to operate automated office equipment
- 54 • Establish good public relations
- 55 • Operate a variety of office equipment
- 56 • Use computers and related technology efficiently
- 57 • Supervise and direct the activities of one or more sections of the legal clerical staff of the
58 department
- 59 • Perform basic arithmetical calculations
- 60 • Understand and appropriately apply interpretation of laws and rules
- 61 • Work effectively and maintain positive working relationships with others, including those of diverse
62 perspectives using interpersonal skills such as listening, speaking, advisory, mediation,

63 reconciliation, and consensus-building

64
65 **EDUCATION AND EXPERIENCE:**

66 A combination of education, training, and experience resulting in the required knowledge, skills, and
67 abilities. An example of qualifying education and experience includes:

68
69 Four years of clerical experience in a legal office or court or one year of experience equivalent to a Legal
70 Clerk III.

71
72 **LICENSES AND CERTIFICATES:**

73 Certain positions within this classification may require driving. When driving is an essential function of the
74 position, a valid CALIFORNIA driver license will be required at the time of appointment and must be
75 maintained throughout employment.

76
77 **SPECIAL SUBCLASS RECRUITMENT:**

78 Recruitment for this classification may be conducted according to the special divisions or programs in
79 which a vacancy exists and the requirements of the position.

80
81
82 This class specification generally describes the duties and responsibilities characteristic of the position(s)
83 within this class. The duties of a particular position within a multi-position class may vary from the duties of
84 other positions within the class. Accordingly, the essential duties of a particular position (whether it be a
85 multi-position class or a single-position class) will be identified and used by medical examiners and hiring
86 authorities in the selection process. If you have any questions regarding the duties, employment
87 standards, or working conditions of the position, please contact the Human Resources Department at
88 805.781.5959.

89
90 Adopted: 09-24-03

91 Revised: 04-26-23

92 XX-XX-XX



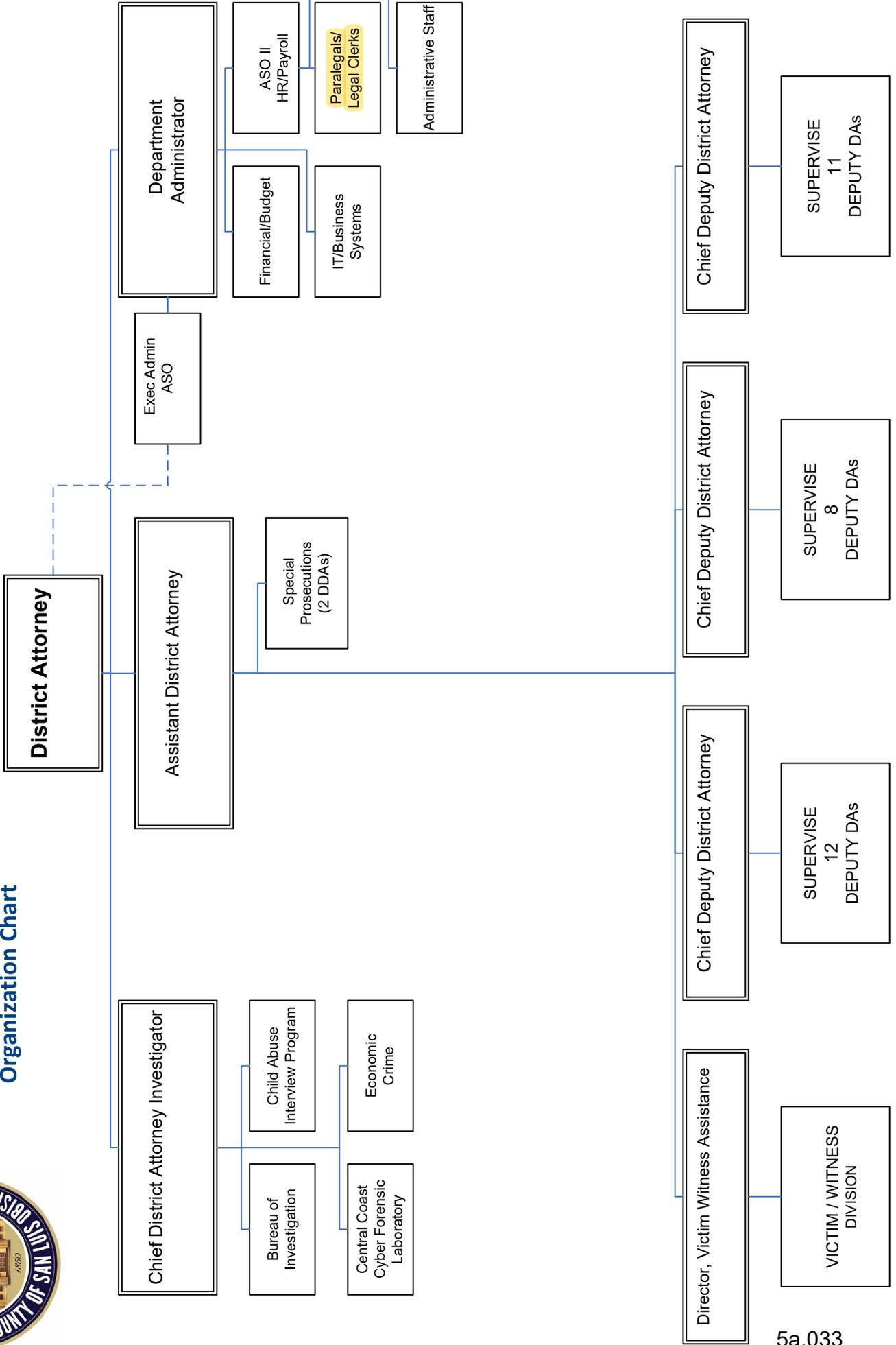
Office of the District Attorney County of San Luis Obispo

Organization Chart

Attachment 7

Revised January 25, 2023

"Bringing justice and safety to our community by aggressively and fairly prosecuting crime and protecting the rights of crime victims."



Our values are: Integrity, Professionalism, Accountability, Communication, and Collaboration.

