

# Classification Study

State Bar of California

Phase I

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SUBMITTED BY:

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## Background/Introduction

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The State Bar of California (State Bar) retained CPS HR Consulting (CPS HR) to conduct an agency-wide classification and total compensation study. This project was divided into two phases, the first phase included all positions in the Office of the Chief Trial Counsel (OCTC) and the second phase will include the remaining positions in the State Bar. This report is limited to the classification study portion of Phase 1; the details of the compensation study will be provided in a separate report.

The purpose of the study was to (i) review the current classification structure and related concepts; (ii) prepare concepts for a more broadly defined classification structure; (iii) prepare new classification specifications; and (iv) ensure that all positions are properly allocated within the newly proposed classification structure.

This Draft Classification Study Report is designed to provide (i) an overview of study tasks; (ii) a conceptual framework for the analysis; (iii) a recommended classification structure; (iv) specific allocation analyses and recommendations for each of the positions encompassed in this study, and (v) the next steps in the study.

This classification study encompassed two hundred thirty-six (236) positions in twenty-three (23) classifications which are listed below:

- Administrative Assistant I
- Administrative Assistant II
- Administrative Secretary
- Assistant Chief Trial Counsel
- Attorney
- Chief Trial Counsel
- Complaint Analyst I
- Complaint Analyst II
- Coordinator of Records
- Deputy Chief Trial Counsel
- Director, Central Administration
- Executive Secretary
- General Clerk III
- Investigator I
- Investigator II
- Investigator Supervisor
- Legal Secretary
- Paralegal
- Program Court Systems Analyst
- Secretary II
- Senior Attorney<sup>1</sup>
- Senior Administrative Assistant
- Senior Administrative Supervisor

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<sup>1</sup> Some Senior Attorney incumbents are currently receiving a 5% differential for performing limited supervisory duties

## Overview/Status of Study Tasks

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In conducting the classification study, CPS HR:

1. Conducted meetings with the Chief Operating Officer; Human Resources Director; the Budget and Performance Analyst, who served as the client’s point of contact for the study; the Chief Trial Counsel; and other members of OCTC management to ensure a comprehensive understanding of the study goals, objectives, and to receive their comments, feedback, and concerns with respect to the study and the process. *(completed)*
2. Conducted an employee orientation session to ensure all employees (i) were apprised of the study goals, processes, and objectives; and (ii) had an opportunity to express any concerns or questions regarding the study. *(completed)*
3. Conducted a detailed analysis of each position through the analysis of individual Position Description Questionnaires (PDQs). *(completed)*
4. Conducted job evaluation interviews with a representative sample of study incumbents in all study classifications, at both the Los Angeles and San Francisco offices, to gain a comprehensive understanding of work performed. *(completed)*
5. Analyzed all of the information gathered via the PDQs and job evaluation interviews to identify the scope and level of work performed by each employee as well as the typical duties and the requisite knowledge, skills, abilities, and other job-related characteristics required to perform the work assigned to each position. *(completed)*
6. Developed Draft Preliminary Classification Concepts for review and feedback. *(completed)*
7. Developed a classification structure consistent with the classification concepts encompassing the total bodies of work being performed within the study positions. *(completed)*
8. Developed new classification specifications supporting the classification structure recommendations. The classification specifications include/describe appropriate job definitions; distinguishing characteristics; supervision received and exercised; essential duties and responsibilities statements; knowledge, skills, and abilities statements; minimum qualifications; any required training, certifications, or licenses; and physical and environmental working conditions. *(Task summaries are presented in Appendix A; full classification specifications for most of the study classifications will be developed after receipt of comments on this draft report. Complete classification specifications for*

*the administrative classifications will not be developed until the completion of Phase II, when all positions within these classifications have been reviewed)*

9. Based on classification concepts, classification structure, and PDQ content, developed recommendations for the allocation of each position to an appropriate classification. *(completed)*
10. Developed this Draft Classification Report for the State Bar’s review. *(completed)*
11. Prepared a Final Classification Report *(to be prepared once the State Bar has had an opportunity to review and provide feedback on this Draft Classification Report)*

## Conceptual Framework

An accurate and up-to-date classification system provides an organization with the necessary tools to make administrative, fiscal, and human resources decisions. Further, accurate, current, and classification specifications provide the fundamental and essential building blocks for successful administration of recruitment, performance management, compensation, and succession planning programs. In addition to providing the basis for human resources management and process decisions, position classification can also effectively support systems of administrative and fiscal control. Identifying positions based on a well-defined and orderly classification system supports organizational planning, budget analysis and preparation, and various other administrative functions.

The classification analysis, as applied to the positions within the State Bar’s OCTC, relies upon sound principles of job evaluation. Using these principles, CPS HR has developed a classification structure for the State Bar that is designed to reflect distinct differences in the levels and types of work being performed based on established classification factors and concepts. This section of the report presents the conceptual framework for the methods used by CPS HR in developing a proposed classification plan for the State Bar’s positions, within OCTC. To facilitate review, this section is organized as follows:

- General Guidelines and Definitions
- Nature of the Work
- Classification Job Family Levels

## General Guidelines and Definitions

### **Standard Classification Factors**

In order to develop classification/allocation recommendations, each position is first analyzed based on the nature of work performed. Nature of work refers to the occupation, profession, or subject matter field in which each position falls. Positions that perform work of a similar nature are considered to be in the same “job family”. Within each job family, the level of the position is then determined by evaluating it against the following factors:

- **Decision Making** - This consists of (a) the decision-making responsibility and degree of independence or latitude that is inherent in the position, and (b) the impact of the decisions.
- **Scope and Complexity** - This defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification.
- **Contact with Others required by the Job** - This measures (a) the types of contacts, and (b) the purpose of the contacts.
- **Supervision Received and Exercised** - This describes the level of supervision received from others and the nature of supervision provided to other workers. It relates to the independence of action inherent in a position.
- **Knowledge, Skills, and Abilities** - This defines the knowledge, skills, and abilities necessary to perform assigned responsibilities.

These factors were carefully and consistently applied during the analysis of each position included in the scope of the study. Not all factors will be as pertinent to all positions and each factor is analyzed in accordance with the importance of that particular factor to the kind of job under study.

### **Whole-Job Analysis**

For purposes of this study, CPS HR used a whole-job analysis approach. This approach compares jobs with one another on the basis of an overall evaluation of difficulty or performance. The entire position, including the skills required, the decision-making authority, the scope, the magnitude of work, and the accountability for results, is compared as a whole to other positions.

### **Broad and Narrow Classifications**

Key to the State Bar’s classification structure is the judicious use of broad and narrow classification concepts. It is easy to determine that several positions belong to the same class when the duties are identical. However, in practice, the duties and responsibilities of positions need not be identical in order to be placed in a common classification. Classification plans generally establish classifications based on a determination of “sufficient similarity”. However,

within an individual organization, sufficient similarity can be interpreted to coincide with the goals and philosophy of the organization. For example, a broad interpretation recognizes positions that share a core set of classification factors, but accepts substantial variation between positions resulting in varied assignments within each broad classification. In contrast, a narrow interpretation might create separate narrow classifications to address such variations.

### ***Point in Time Analysis***

A classification study primarily captures the essential nature of positions at a single point in time. Therefore, recommendations cannot be based upon all possible future changes, particularly in a rapidly changing environment where organizational needs, technologies, and skill requirements are continuously evolving. CPS HR has, to the extent possible, designed a classification structure in line with the State Bar’s current goals, recognizing that other additions or deletions from the plan may take place in the future. Overall, the proposed classification structure, the levels of work, and the functional areas identified should provide a strong foundation for the State Bar’s future classification needs.

### ***Preponderant Duties***

Classification studies often find that positions are assigned a wide range of duties and that incumbents have various levels of responsibility at any one time. Therefore, the positions must be analyzed based on their preponderant duties. Preponderance is a measure of importance, and the most preponderant duties of a position are those that support the primary purpose of the position. Sometimes the most time-consuming duties of a position are preponderant; however, consideration must sometimes be given to the responsibility and complexity of certain duties that do not occupy the majority of the incumbent’s time. Overall, the determination of preponderance is a judgment call based on a consistent set of factors.

### ***Sufficient Similarity***

It is easy to see that several positions belong to the same class when the duties are identical. In practical application, however, the duties and responsibilities of positions need not be identical in order to be placed in a common class. Instead, classification plans generally place positions into classes based on a determination of “sufficient similarity”. However, within an individual organization “sufficient similarity” can be broadly or narrowly interpreted. A broad interpretation recognizes positions that share a core set of classification factors, but accepts substantial variation between positions, resulting in broad classes. In contrast, a narrow interpretation might create separate narrow classes to address such variations.

### ***Level and Not Volume of Work***

Position classification is a reflection of the level of work performed by an employee and is generally independent of volume. For example, if one employee processes double the work of another, yet the percentages of time spent on those tasks and other duties are comparable, a single classification should be appropriate for both positions. In fact, study questionnaires do not ask for, and the consultants do not consider, the relative productivity of employees when evaluating positions. Likewise, classifications are not distinguished by the amount of time spent by incumbents on tasks or the volume of work assigned to positions since problems of excessive workload are properly solved by redistributing work or adding employees, and not by creating new classifications.

### ***Classification of the Position, Not the Employee***

Position classifications should be consistent regardless of who holds the position. As such, a classification study process classifies positions, not individual employees. Furthermore, classification does not consider the capabilities of individual employees or the efficiency and effectiveness of an incumbent. It is not a measure of how well an individual employee performs but of the actual duties assigned to the employee. Thus, classification is not a tool to reward individual achievement, nor should classifications be created simply to reward length of service.

### ***Position versus Classification***

Position and classification are two words that are often thought of as interchangeable; but in fact have very different meanings. In a classification plan, a position is an assigned a group of duties and responsibilities performed by one person. Sometimes the word “job” is appropriately used in the place of position.

In contrast, a classification may contain only one position, or may consist of a number of positions. When there are several positions assigned to one classification, it means that the same title is appropriate for each position because the scope, level, duties, and responsibilities of each position assigned to the classification are sufficiently similar (but not necessarily identical); the same core knowledge, skills, and other requirements are appropriate for all positions; and the same salary range is equitable for all positions.

### ***Classification versus Allocation***

Classification is the process of identifying and describing the various kinds of work in an organization and grouping similar positions together based on job family, classification series, and classification distinctions. Allocation is more specifically tied to the placement and/or budgeting of positions within an organization. Thus, agencies may allocate a position within an organization based on the results of the classification analysis for that position.

## Nature of the Work

The overall nature of the work being performed provides the basis for establishing job families and helps group positions according to their overall functions and responsibilities. Classifications in a job family usually have similarities in their employment requirements that may support career progression. However, classes in the same job family may still require different levels of education, experience, skill, effort, or responsibility. These categories are described as follows:

- **“Clerical/Administrative” classifications** are responsible for general office and/or secretarial support work such as document production/processing, filing, reception, calendar maintenance, scheduling, and data entry. Typically, incumbents use a basic knowledge of office procedures, combined with basic reading, writing and arithmetic skills.
- **“Technical” classifications** describe work that requires specialized skills, knowledge, and abilities typically acquired through practical experience. Positions at the technician level typically require incumbents to have, at a minimum, a high school diploma or GED equivalency, combined with college level courses or possession of technical certification.
- **“Professional” classifications** typically describe work that is analytical in nature, requiring incumbents to possess sufficient knowledge and skill to analyze problems, evaluate and identify alternatives, and recommend/implement actions/solutions; such knowledge is usually obtained through possession of a four-year college degree and/or a highly specialized and advanced type of training.

### *Classification Job Family Levels*

Within each classification series, there may be a classification at every level or only at selected levels. The levels within a job family reflect the organization and should be tailored to that organization’s needs and priorities. The categories recommended are described as follows:

- **Entry-level** classifications are designed to provide an on-the-job training opportunity to an employee who has limited or no directly related work experience and is not yet performing the full range of work assigned to the journey-level class. In some cases, positions which are limited in scope and/or performing duties that are more basic may be permanently allocated to the entry-level.
- **Journey-level** classifications recognize positions that perform the full range of tasks typically assigned to positions in the job family. A journey-level position requires incumbents to be fully competent in performing assigned duties. The designation of “II” may be used for a journey-level classification.

- **Advanced journey-level** classifications describe positions with specialized and/or advanced duties beyond the journey level of the series. Incumbents may also serve as a lead. Leads are typically responsible for providing lead supervision to a group of at least three lower level staff while performing the day-to-day work themselves. The designation of “III” or “Senior” may be used for an advanced level classification.
- **Supervisor-level** classifications describe full, first-line supervisory positions that plan, assign, supervise, and formally review the work of subordinates; assist in program development and management; and assume responsibility for a variety of personnel actions in such areas as performance evaluation, training, selection, transfers, approval of leave, and recommending disciplinary measures. Supervisors may also assist in budget development and administration. Most “working” supervisors also spend a substantial portion of their time performing the more difficult and complex work of the section or unit.
- **Manager-level** classifications describe positions with full responsibility for planning, organizing, directing staff, and controlling a major unit or division within a department. Managers are also responsible for the strategic planning and budget oversight for assigned functions and/or operations for a department.
- **Executive Manager-level** classifications describe positions with full responsibility for staffing, management and strategic planning of all department activities and projects, as well as, working with other State Bar departments to forecast, plan for, and coordinate services to be provided State Bar customers.

## Classification Analysis and Recommended Classification Structure

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The classification structure recommended by CPS HR retains much of the current structure, but changes the classification concepts for some classifications and eliminates a classification. The proposed structure: (i) consolidates classifications where the duties and responsibilities of the work assigned are sufficiently similar in scope and complexity; (ii) creates new classifications where the duties and responsibilities are sufficiently unique in scope and complexity, and (iii) provides clearer distinctions among the different classifications.

### State Bar of California - Recommended Classification Structure

Chief Trial Counsel  
Deputy Chief Trial Counsel  
Assistant Chief Trial Counsel  
Supervising Attorney  
Senior Attorney  
Attorney  
Investigator III  
Investigator II  
Investigator I  
Customer Services Representative  
Paralegal Supervisor  
Paralegal  
Administrative Supervisor  
Senior Administrative Assistant  
Legal Secretary  
Administrative Assistant II  
Administrative Assistant I  
General Clerk

The next section of this report provides a summary of the titles, nature of work performed, and a brief narrative on typical duties and responsibilities assigned to each proposed classification within the OCTC. The summaries provided are intended to provide a general description of how the classification concepts are applied within the classifications within the series. Complete new or revised classification specifications (job descriptions) will be developed once the concepts are approved by the State Bar.

- **Chief Trial Counsel (CTC)** - CPS HR proposes that this classification be retained. This classification is responsible for working on strategic initiatives and specialized goals from the State Bar Board of Trustees (Board) and Regulation and Discipline Committee (RAD); working with the Board and RAD on policy development and operational performance, managing the overall operational efficiency and effectiveness of OCTC, and handling public communications related to OCTC. CPS HR did not make any changes to this classification.
- **Deputy Chief Trial Counsel (DCTC)** - CPS HR proposes that this classification be retained. This classification is responsible for implementing the leadership directives of the Chief Trial Counsel (CTC). This includes developing and implementing policies, procedures, and strategic plans for the Misappropriation & Fraud, Performance & Conflicts, and Intake units; and overseeing all of the operations of the OCTC to ensure the efficient and appropriate functioning of the office through one or more subordinate Assistant Chief Trial Counsel positions. CPS HR did not make any changes to this classification. However, if the Assistant Chief Trial Counsel classification becomes more management/strategic focused, there will be a need for a clearer distinction between this classification and Assistant Chief Trial Counsel.
- **Assistant Chief Trial Counsel (ACTC)** – CPS HR proposes that this classification be retained, with revisions. This classification is responsible for directing and managing the staff and work processes of the assigned unit within OCTC – Misappropriation & Fraud, Performance & Conflicts, or Intake. Currently, the incumbents in this classification spend a large percentage of their time on direct supervision and attending various team meetings. With the creation of the Supervising Attorney classification, recommended below, CPS HR recommends revisions to the ACTC classification to emphasize management responsibilities such as the strategic planning of unit efforts and goals, the development of policies, and greater participation in the overall operations of the OCTC; with less emphasis on supervisory responsibilities.
- **Supervising Attorney (working title Supervising Trial Counsel)** - CPS HR proposes the creation of this new classification. Currently, some positions in the Senior Attorney classification have been assigned limited lead/supervisory duties such as assigning of cases, reviewing work, providing direction, and providing input on performance

evaluations. These incumbents are receiving a 5% pay differential. This proposed classification will be assigned full supervisory responsibilities, including the approval of time sheets, preparation and delivery of performance evaluations, addressing performance issues, and imposing discipline. This proposed classification will assume the majority of the direct supervisory duties currently performed by the ACTC classification.

- **Senior Attorney (working title Senior Trial Counsel)** - CPS HR proposes that this classification be retained. In the enforcement related units, this classification is responsible for managing and coordinating a caseload of the most complex and sensitive cases in the office including cases involving several complainants and/or multiple legal issues, cases likely to result in media attention, cases in specialized areas such as insurance issues, non-attorney cases, and reinstatement cases. In the Intake Unit, this classification assists the ACTC by ensuring that matters are handled appropriately and timely by assigning files to the team, providing input where needed, and ensuring files are closed or forwarded to Enforcement within 60 days. CPS HR did not make any changes to this classification.
- **Attorney (working title Deputy Trial Counsel)** - CPS HR proposes that this classification be retained. When assigned to an enforcement unit, this classification serves as trial counsel in bar discipline matters, which includes providing legal advice to investigators with an eye toward effective prosecution through litigation, and thereafter prosecuting disciplinary matters in the State Bar Court through trial preparation and all phases of prosecution of matters. When assigned to the Read Team in the Intake Unit, this classification reads, reviews, analyzes, and notes all possible ethical violations in all complaints, both routine and complex, on all areas of the law. When assigned to the Worker Team in the Intake Unit, this classification undertakes and oversees the evaluation/investigation and disposition of complaints involving allegations of attorney misconduct. CPS HR did not make any changes to this classification.
- **Investigator III** - CPS HR proposes that the current Investigator Supervisor classification be retitled to Investigator III and redefined as the lead/advanced journey-level in the Investigator classification series. Positions assigned to the Investigator III classification are responsible for the preparation of case status reports, guiding the work of Investigator Is and Investigator IIs in their determination of the evidence needed to support allegations, and reviewing and approving the investigation plans prepared by Investigators. Current positions assigned to the Investigator Supervisor classification do not have full supervisory responsibilities, and responsibility for the assignment of cases to lower level Investigators was recently reassigned to Senior Attorneys. The nature of the work assigned to Investigator Supervisor positions is more consistent with the lead/advanced journey-level.

- **Investigator II** - CPS HR proposes that this classification be retained. This classification is defined as the journey-level in the Investigator classification series and is responsible for thoroughly investigating complaints made against attorneys for misconduct. CPS HR did not make any changes to this classification.
- **Investigator I** - CPS HR proposes that this classification be retained. This classification is defined as the entry-level in the Investigator classification series and is responsible for investigating complaints made against attorneys for misconduct. The intent of this classification is that incumbents are paired with a tenured Investigator II who serves as their mentor and are assigned less complex cases. In reality, this is not always the situation since cases that initially appear to be less complex often times develop into complex cases during the investigative process. CPS HR recommends that positions assigned to this classification be consistently utilized as a training classification where incumbents receive direct mentorship from a tenured Investigator II and are moved to the Investigator II level once they are able to independently investigate both routine and complex cases.
- **Customer Services Representative** – CPS HR proposes that the current classification of Complaint Analyst I be retitled to Customer Services Representative and the classification specification be revised to more accurately reflect the work assigned to positions in this classification. As determined by the analysis of the PDQs and additional information collected in the incumbent interviews, the main focus of the Complaint Analyst I classification is to answer and respond to calls on the Attorney Complaint Hotline and provide a variety of information to callers. Other duties include assisting clients with the completion of forms and the preparing standard letters that require some customization. The nature of the work assigned to positions in this classification is primarily customer service focused. An alternative title for this classification would be Complaint Services Representative.

Should positions in this classification be assigned responsibility for the review of complaints, providing initial recommendations regarding whether they should be pursued, and the investigation & analysis of complaints under supervision, CPS HR recommends a reanalysis of these positions.

- **Paralegal Supervisor**- CPS HR proposes the creation of this new classification. Currently, this work is completed by a Senior Administrative Supervisor, and the incumbent supervises a team of Paralegals. Specific duties include logging and assigning paralegal request assignments; following-up to ensure deadlines are met; providing guidance to and answering questions from Paralegals; and evaluating, training, and mentoring staff. The work performed by Paralegals is greater in complexity than the work assigned to positions supervised by Senior Administrative Supervisors, requiring greater legal

research skills and analysis of legal documents. Since the incumbent in this position supervises and performs paralegal work, CPS HR recommends the classification of Paralegal Supervisor which would be at a higher level than Senior Administrative Supervisor.

- **Paralegal** - CPS HR proposes that this classification be retained. This classification is responsible for assisting with case planning, development, and management; performing legal research, interviewing clients, gathering facts and retrieving information; drafting and analyzing legal documents; collecting, compiling, and utilizing technical information to make recommendations to an attorney. CPS HR did not make any changes to this classification.
- **Administrative Supervisor** – CPS HR proposes that the current classification of Senior Administrative Supervisor be retitled to Administrative Supervisor. This classification is defined as the supervisory level providing guidance, support, and direction to assigned staff within the department; responsible for internal customer service; evaluating, mentoring, and training staff; and constantly monitoring work flow within assigned units. No other change is recommended.
- **Legal Secretary** – CPS HR proposes that this classification be retained. This classification performs specialized legal secretarial duties related to the specific work and function of the office or unit to which the position is assigned. Major duties include filing pleadings and/or finalizing other documents: proofreading/editing, data entry, faxing, scanning, copying, scheduling meetings, and emailing information; organizing files for closing: populating standard letters, preparing edit sheets, ensuring checklists are complete, and indexing files/folders; other duties include file delivery and tracking, date stamping, and transcribing. CPS HR did not make any changes to this classification.
- **Senior Administrative Assistant** - CPS HR proposes that this classification be retained. This classification provides lead supervision to assigned staff within a unit and provides a broad range of administrative and technical assistance; and assumes operational responsibility for activities unique to the assigned unit. CPS HR did not make any changes to this classification.
- **Administrative Assistant II** – CPS HR’s **preliminary** proposal is that the Administrative Assistant II classification and the Administrative Secretary be consolidated into this single classification and that the class specification for Administrative Assistant II be revised to more accurately reflect the work assigned to positions in these classifications. There are currently one Administrative Assistant II position and seven Administrative Secretary positions in OCTC. There are a total of 34 Administrative Assistant II positions and 10 Administrative Secretary positions throughout the State Bar. The primary responsibility of the single Administrative Assistant II position is the coordination of

OCTC's cost recovery program, which includes completing and providing cost worksheets to attorneys, researching applicable costs over multiple years, tracking worksheets, filing cost certificates with the court, and providing statistics on the number of incorrect addresses. This position also provides administrative support including answering telephones and email, supplying information to the general public, and assisting with the administration of internal training. The Administrative Secretary positions are responsible for providing assistance to staff with administrative questions, processing time cards, independently preparing correspondence and other documents, running system reports and copying data into a spreadsheet, reconciling purchase card statements, and completing special projects. The duties performed by positions in both classifications are similar in nature in that they involve clerical/administrative duties that are routine in nature, but require a higher level of independence and the performance of more complex processes as compared to the Administrative Assistant I and Secretary II classifications.

Given the fact that CPS HR only received data on one out of the 34 Administrative Assistant I positions within the State Bar, CPS HR recommends delaying the implementation of the above recommendation until after Phase II has been completed.

- **Administrative Assistant I** – CPS HR's **preliminary** proposal is that the Administrative Assistant I, the Secretary II, and the Coordinator of Records classifications be consolidated into this single classification, and that the class specification for Administrative Assistant I be revised to more accurately reflect the work assigned to positions in these classifications. There are currently two Administrative Assistant I positions, 12 Secretary II positions, and 14 Coordinator of Records positions in OCTC. There are a total of 15 Administrative Assistant I positions, 12 Secretary II, and 25 Coordinator of Records positions throughout the State Bar. The Administrative Assistant I positions and the Secretary II positions are all responsible for providing journey-level clerical and office support, which includes proofreading, collating, tracking and distributing documents; photocopying, faxing, and scanning; data entry in an electronic database and on forms; using macros to populate standard letters and memos; and creating and maintaining files. These positions may also be assigned other common clerical duties. The Coordinator of Records positions are responsible for coordinating the creation, organization, maintenance, and closure of records/files; and performing various clerical and support activities. The primary focus of these positions is the entry of data/information into a database system, ensuring the information is entered correctly, generating case numbers, constructing new files, and forwarding and tracking files and case information. In general, the responsibilities of positions in all three classifications consist of routine journey-level clerical/administrative tasks that are clearly defined and require minimal judgment.

Given the fact that CPS HR only received data on two out of the 15 Administrative Assistant I positions within the State Bar, CPS HR recommends delaying the implementation of the above recommendation until after Phase II has been completed.

- **General Clerk** – CPS HR recommends that the current classifications of General Clerk I, General Clerk II, and General Clerk III be consolidated into this single classification. The State Bar currently does not have any positions allocated to either the General Clerk I or General Clerk II classifications. There are five General Clerk III positions within the State Bar and all of them are in the OCTC. The General Clerk III positions are responsible for performing routine clerical support duties including receiving, opening, time-stamping and distributing mail; collecting, logging, and distributing faxes; collecting and delivering court filings and/or edits; and photocopying and scanning. Given the level of duties performed and the fact that the General Clerk I and General Clerk II classifications are not being used, CPS HR sees no reason to retain the three different levels within this classification series. **Pending the study of additional clerical positions and classifications in Phase II, CPS HR may recommend that this classification be retitled to Office Assistant.**

CPS HR recommends the elimination of the Complaint Analyst II classification. There is significant overlap between this classification and the Investigator I classification. The role of the Complaint Analyst II classification has been expanded so that the nature of the work performed by incumbents in this classification more closely fits the Investigator I classification.

CPS HR recommends that any decisions regarding the Director, Central Administration classification, the Executive Secretary classification, and the Program Court Systems Analyst classification be delayed until Phase II of this project, when CPS HR will have an opportunity to collect more information regarding positions in these and similar classifications located outside of OCTC.

A crosswalk between the current classification structure and the recommended classification structure is presented in the table on the following page.

<b>State Bar of California</b> <b>Classification Study – Phase I (OCTC)</b> <b>Crosswalk of Current Classification Structure and</b> <b>Recommended Classification Structure</b>	
<b>Current Structure</b>	<b>Recommended Structure</b>
Chief Trial Counsel	Chief Trial Counsel
Deputy Chief Trial Counsel	Deputy Chief Trial Counsel
Assistant Chief Trial Counsel	Assistant Chief Trial Counsel
	Supervising Attorney
Senior Attorney	Senior Attorney
Attorney	Attorney
Investigator Supervisor	Investigator III
Investigator II	Investigator II
Investigator I	Investigator I
Complaint Analyst II	Deleted
Complaint Analyst I	Customer Services Representative
	Paralegal Supervisor
Paralegal	Paralegal
Senior Administrative Supervisor	Administrative Supervisor
Legal Secretary	Legal Secretary
Senior Administrative Assistant	Senior Administrative Assistant
Administrative Assistant II	Administrative Assistant II
Administrative Secretary	
Administrative Assistant I	Administrative Assistant I
Secretary II	
Coordinator of Records	
General Clerk I/II/III	
	General Clerk