

## Job Description General Counsel

<b>DEPARTMENT:</b>	Legal	<b>REPORTS TO:</b>	General Counsel
<b>TITLE CODE:</b>	8312EO	<b>DATE:</b>	10/30/13
<b>POSITION CODE:</b>	R99791	<b>ADMINISTRATIVE REVISION:</b>	07/24/15

### Job Summary

Under the administrative direction of the Chief Executive Officer, represents and advises OCERS Board and staff in all legal matters pertaining to the daily operations of OCERS. Manages the legal division and ensures that all activities of OCERS are legally supportable and carried out in accordance with applicable laws, regulations and rules. Oversees work with outside legal firms providing specialized services to the agency; researches, prepares and presents legal opinions and coordinates division activities with other agency officials or outside agencies. Provides responsible and complex legal support to the agency in meeting operational and fiduciary responsibilities and performs related duties as required.

### Distinguishing Characteristics

The General Counsel is the single position executive management level class responsible for providing legal services and counsel on a wide range of legal issues to assist the agency in fulfilling operational and fiduciary responsibilities.

Administrative direction is received from the Chief Executive Officer. The incumbent exercises direct supervision over assigned professional and legal support staff.

### Performance Attributes

Include but are not limited to the following:

- ▶ Directs Legal division activities including long and short range planning, development and presentation of legal opinions and coordinating representation of the agency in litigation involving public pension law and other specialized areas of law such as institutional investments, family-law, tax law, securities law, probate, contracts and medical-legal issues; consults with outside attorneys on agency related matters.
- ▶ Serves as legal counsel to the agency; advises agency officials in legal matters pertaining to their offices and meeting their fiduciary responsibilities; researches, prepares and presents legal opinions; ensures that activities of the agency are legally supportable and in accordance with agency rules and regulations; assists in the representation of the agency in litigation, disability hearings and other legal matters; consults with fiduciary counsel employed by the Board, as appropriate, on matters related to the agency.
- ▶ Confers with agency managers regarding current anticipated legal services requirements and issues; analyzes the feasibility of alternative approaches to meeting requirements; develops and recommends agency-wide short and long term legal services and plans.

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- ▶ Develops, implements and maintains Legal Division's goals, objectives, policies and priorities for appropriate service areas; ensures that established goals and priorities are achieved.
- ▶ Plans, directs and coordinates the Legal Division's work plans through appropriate division staff; assigns work activities and responsibilities to appropriate personnel; reviews and evaluates work methods and procedures; identifies and resolves problems and/or issues.
- ▶ Oversees the selection, training and evaluation programs for all Legal Division personnel; establishes performance requirements and staff development goals; identifies and resolves staff deficiencies; executes discipline and/or termination procedures.
- ▶ Develops and provides legal education programs to the Board and staff; provides and coordinates staff and Board training on legal issues.
- ▶ Manages and coordinates the development of the Legal Division's budget; monitors and approves expenditures; advises appropriate division personnel on budget matters; makes adjustments to the budget as necessary.
- ▶ Serves as a resource for division personnel and agency staff; coordinates legal services activities with other divisions and with outside agencies and organizations.
- ▶ Attends and participates in professional and community meetings as necessary; stays current on legal issues relative to retirement system operations and fiduciary requirements; responds to and resolves sensitive and complex legal inquiries and issues.
- ▶ Performs other duties as directed.

### **Minimum Qualifications**

Minimum qualifications required for entry into the classification

#### ***Education and/or Experience***

Any combination of education and experience that has provided knowledge, skills and abilities necessary for a General Counsel. A typical way of obtaining the required qualifications is to possess the equivalent of seven years of progressively responsible experience in a comparable legal environment including involvement with litigation and program management. Must have a Juris Doctor degree from a fully accredited American Bar Association approved law school or equivalent qualification.

#### ***Special Notes, Licenses or Requirements:***

- ▶ Current membership in the State Bar of California.
- ▶ A valid California class C driver's license or the ability to arrange necessary and timely transportation for field travel.
- ▶ May be required to use personal vehicle.
- ▶ A complete background investigation is required; a felony or misdemeanor conviction may be a disqualifying factor from employment.

### ***Knowledge/Skills/Abilities***

Sample of KSA's necessary to perform essential duties of the position

#### ***KNOWLEDGE OF:***

- ▶ Principles and application of civil and administrative law and procedure.
- ▶ Applicable federal, state and local laws, codes and regulations.
- ▶ Retirement system and public agency functions and associated legal requirements.
- ▶ Methods and techniques of case management, prioritization and control.
- ▶ Principles and practices of budget administration.
- ▶ Methods and techniques of supervision, training and motivation.
- ▶ Methods and techniques for report preparation and record keeping.

#### ***SKILLS/ABILITY TO:***

- ▶ Plan, organize, integrate and manage legal activities of the agency.
- ▶ Analyze alternatives, draw logical conclusions and develop efficient, cost effective solutions.
- ▶ Present persuasive legal opinions, both orally and in writing.
- ▶ Develop, implement and enforce appropriate procedures and controls.
- ▶ Apply applicable laws, codes and regulation.
- ▶ Communicate clearly and concisely, both orally and in writing.
- ▶ Maintain confidentiality of information.
- ▶ Establish and maintain effective working relationships with all levels of management, employees, contractors and others encountered in the course of work.

### ***Physical, Mental and Environmental Conditions***

The following is a description of the physical and mental abilities that are customarily required to perform the essential job functions of this position.

#### ***Physical and Mental Demands***

- ▶ Speak and hear well enough to communicate in English clearly and understandably in person, over the telephone, and in groups.
- ▶ Manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a telephone, keyboard, write and use a calculator.
- ▶ Mental stamina to interact professionally with members of the Board of Retirement, Plan Sponsors, peers and members.
- ▶ Vision sufficient to read fine print and a computer monitor.

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- ▶ Independent body mobility, agility, and stamina to stand, walk, stoop, bend, and twist, to access a standard office environment.
- ▶ Ability to sit for prolonged periods of time.
- ▶ Body strength sufficient to lift up to 25 pounds and carry files.

### ***Environmental Conditions***

- ▶ The primary work place is in an office environment, working with standard office equipment.
- ▶ Peripheral office equipment generates to a quiet moderate noise level.
- ▶ Operates in an environment that includes elected officials, non-elected officials, government agencies, community interest groups and the general public in the development and coordination of OCERS affairs.
- ▶ Out of area travel may be required to attend professional conferences and meetings.

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### **Acknowledgement**

By signing below, I acknowledge that I have reviewed and discussed the contents, requirements, and expectations included in this job description with my supervisor and a copy has been provided to me.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Reviewer Signature

\_\_\_\_\_  
Date