



COMMONWEALTH OF PENNSYLVANIA
invites applications for:

Legal Assistant 2

The Commonwealth of Pennsylvania is proud to be an equal opportunity employer supporting workplace diversity.

SALARY: \$37,066.00 - \$55,844.00 Annually
JOB TYPE: Civil Service Permanent Full-Time
DEPARTMENT: State Employees' Retirement System
LOCATION: Dauphin County
OPENING DATE: 01/23/18
CLOSING DATE: 02/06/18 11:59 PM
JOB CODE: 07020
POSITION NUMBER: 00186390
UNION: AFSCME Master Agreement
BARGAINING UNIT: A1
PAY GROUP: ST05
BUREAU/DIVISION CODE: 1002
BUREAU/DIVISION: Legal Office
WORKSITE ADDRESS: 30 North Third Street
CITY: Harrisburg, PA
ZIP CODE: 17101
CONTACT NAME: Katie Mathews
CONTACT PHONE: 717.237.0242
CONTACT EMAIL: kmathews@pa.gov

THE POSITION:



GENERAL INFORMATION

- **Work Hours:**
 - 8:00 a.m. - 4:30 p.m. or 8:30 a.m. - 4:30 p.m. preferred
 - 7:30 a.m. - 4:00 p.m. or 8:00 - 4:00 p.m. may be considered

- **Supervisor:** Lena Bickle, Administrative Officer 2
- **Seniority:** This vacancy is subject to the seniority provisions of the AFSCME Master Agreement

POSITION PURPOSE

Performs advanced administrative legal work within the SERS Legal Office. Work involves assisting the business attorneys, chief counsel and administrative officer with all aspects of work handled by the business side of the Legal Office which consists of varied and complex financial transactions crucial to the business of SERS. The work is performed independently under the general supervision of an Administrative Officer or assigned attorney. Work primarily involves document review for a variety of case-specific facts, analysis of the transaction, and preparation of finalized documents, the performance of advanced administrative work, as well as legal research and writing. This work involves handling sensitive and confidential matters consistent with the attorney-client privilege.

DESCRIPTION OF WORK:

ESSENTIAL FUNCTIONS

1. Communicates effectively both oral and written
2. Conducts legal research
3. Applies knowledge of SERS code, rules and regulations in performance of work
4. Performs duties in accordance with the Right to Know Law
5. Analyzes written rules & regulations
6. Uses standard office equipment, applications, software, and websites - multi-function machine, computer, phone, Microsoft Office suite, Lexis-Nexis, etc.
7. Gathers and compiles data
8. Adapts to fluctuating workloads and priorities
9. Delivers documents to other agencies up to 1 mile away
10. Files electronic and hardcopy information

RESPONSIBILITIES

Reviews and redacts, independently, final executed investment documents and purchase agreements in compliance with the Right to Know Law (RTKL), and uploads redacted documents to Treasury's e-Library within specified timeframe. Creates and maintains RTKL record spreadsheet.

Acts as liaison and CMS superuser and indexer for Legal Office Business Attorneys Team. Has primary responsibility and is delegated the full authority for reviewing and analyzing closing binders, index forms, data and documents for appropriateness of CMS input. Imports/scans and indexes such documents into CMS. Creates and maintains CMS documents record spreadsheet.

Performs various legal research assignments including on-line Lexis-Nexis searches to obtain pertinent information requested by attorneys.

Analyzes and completes subscription documents for the Investment deals including, but not limited to, Anti-Money Laundering certification and documentation.

Reviews and redacts investment closing documents for circulation to Treasury, Comptroller and OFA.

Reviews Investment side letters and makes recommendations to Business attorneys based on analysis of side letter language.

Develops and maintains hard file system and electronic Contract Tracking System (CTS) for all Investment documents.

Coordinates and assists attorneys in preparing initial drafts of contracts for legal services in accordance with OGC directives and procedures.

Maintains proficiency in the application of the Commonwealth Field Procurement Manual requirements and procedures and any applicable Management Directives regarding contracts, interagency agreements, funding adjustments and amendments to the foregoing.

Reviews corporation consents, revise as necessary and manage the process for adopting consents and maintaining corporate books. Communicates and coordinates with outside counsel or investment manager as needed for corporate minutes.

Corresponds with SERS' Chairman and Chairman's assistant to obtain authorization for various investment documents.

Scans and distributes executed investment closing documents to general partners and investment managers.

Analyzes and recommends approval of invoices for payment of outside counsel legal fees. Monitors payment process.

Serves as the liaison to outside legal service providers, staff attorneys and compensating party. Communicates effectively with outside counsel, investment managers, agency personnel and others on issues involving legal services. Exercises judgment and discretion in oral and written communications. Provides information on a confidential basis and relates pertinent information to appropriate parties.

Serves as liaison to outside counsel retained to represent SERS in connection with real estate investment transactions or litigation.

Maintains proficiency in the use and entering of information regarding Outside Counsel contracts and invoices on OGC's Lawnet system. Compiles data, prepares, executes and generates monthly Outside Counsel Reports and Significant Transaction Reports and distributes to OGC through LawNet.

Peruses, docket and prioritizes incoming investment legal mail. Maintains tickler system. Compiles and maintains real estate/investment files for staff reference.

Researches, collects information and prepares a response to calls/e-mails received from investment managers, consultants, service providers or advisors or general partners.

Answers incoming calls and secures clear and concise messages. Provides information of a non-confidential nature and relays pertinent information to requesting parties.

Maintains the external maintenance of minutes of real estate title holding vehicles.

Monitors progress and assists in obtaining necessary signatures and approvals for Investment contracts (Investment Management Agreements, Limited Partnership Agreements, etc.).

Prepares Tax Certifications and Powers of Attorney for foreign advisors/tax consultants. Coordinates and liaise with subcustodian, sub-subcustodian, foreign advisors and foreign taxing bodies for repatriation of funds and tax filings for review/release by the supervisor.

Develops and monitors document archival and retrieval procedures and retention schedules.

Coordinates safekeeping, archiving and distribution of original transaction documents with subcustodian bank.

Memorializes written procedures for functional responsibilities, including safekeeping of transaction documents in-house and by the subcustodian bank.

Coordinates and assists attorneys in monitoring investment managers' insurance compliance and obtaining insurance-related documentation when deficient, as necessary.

Provides assistance and administrative support to the Administrative Officer, Chief Counsel and other Legal Office attorneys.

Performs related duties as required.

DECISION MAKING

Performs legal research and prepares documents for discovery at the direction and under the

supervision of the assigned attorney, who is ultimately responsible for the legal decision of a particular matter. In order to make such decisions, knowledge of applicable federal and state laws, rules and regulations, policies and procedures is required.

REQUIRED EXPERIENCE, TRAINING & ELIGIBILITY:

MINIMUM EXPERIENCE AND TRAINING

You must meet the minimum experience and training for the job title:

One year as a Legal Assistant 1; or Four years of responsible clerical, investigative or enforcement work including one year of legal clerical support experience; or An equivalent combination of experience and training.

PA RESIDENCY

Pennsylvania residency is required.

RECRUITMENT METHODS

You must be eligible for selection in accordance with civil service rules. Applicants must meet one of the following methods to be considered for this vacancy.

1. Seniority Promotion
2. Seniority Unit Lateral
3. Seniority Civil Service Lists

The next lower classification(s) for promotional purposes in accordance with collective bargaining are: Legal Assistant 1 (07010).

When the collective bargaining obligation(s) have been met, then the following recruitment methods may be used:

1. Civil Service Lists
2. Transfer
3. Reassignment
4. Reinstatement
5. Voluntary Demotion
6. Promotion Without Exam (PWOE)
 - You must have or have held regular civil service status in one of the following classifications:
 - Legal Assistant 1 (07010)
 - Clerk Typist 3 (00230)
 - Or have held regular civil service status in a pay range ST04 or equivalent position for which the appointing authority can establish a logical occupational, functional, or career developmental relationship to the higher position.
 - You must meet meritorious service criteria defined as (a) the absence of any discipline above the level of written reprimand during the 12 months preceding the closing date of this posting, and (b) the last due overall regular or probationary performance evaluation was satisfactory or higher.
 - You must meet seniority criteria defined as a minimum of one year in the next lower class(es) by the posting close date.

APPLY

The following materials must be submitted with the online application.

- Resume
- Employee performance review: most recent regular or probationary review or indicate that one is not available.
- Memo/letter (voluntary demotion only): indicate you will accept the appropriate reduction in pay.

Reminder: Please make sure application materials clearly show legal clerical support experience. SERS-HR staff must evaluate all applicants for eligibility and minimum experience and training

requirements.

Applicants should apply online. Visit www.employment.pa.gov. Click on the Open Jobs tile. From the Menu in the upper left corner of the screen, select the PA Internal Job Postings link. Open the relevant job announcement and from within the announcement, click the green Apply button. Use the point of contact listed above if you are unable to apply online and require assistance with an alternate application method.

Failure to comply with the above application requirements will eliminate you from consideration for this position. Please use the contact information provided for assistance

You can [track the status](#) of current SERS openings from the Jobs page of the SERS website.

APPLICATIONS MAY BE FILED ONLINE AT:
<http://www.employment.pa.gov>

Position #I-2017-09985
LEGAL ASSISTANT 2
KM

OUR OFFICE IS LOCATED AT:
613 North Street
Harrisburg, PA 17120

jobs@pa.gov

An Equal Opportunity Employer
