

EXECUTIVE SUMMARY

The Court Reporters Board of California (Board) requested that the Department of Consumer Affairs' Office of Professional Examination Services (OPES) conduct an occupational analysis to identify critical job activities performed by Certified Shorthand Reporters (CSRs) in the State of California. The purpose of the occupational analysis is to define practice for CSRs in terms of the actual job tasks that new licensees must be able to perform safely and competently, and the knowledge that new licensees must have in order to perform these tasks. The results of this occupational analysis serve as the basis for the examination program for CSRs in California.

To develop a legally defensible examination plan, OPES conducted interviews and researched the profession and facilitated two focus group workshops with California licensed CSRs between December 2008 and December 2009.

Working with an OPES examination development specialist, the first focus group used a content validation strategy to establish a description of practice. They reviewed task and knowledge statements developed by OPES based on the interviews. Licensees were then asked to review, refine, and develop additional task and knowledge statements to assist in defining the practice.

Following the review performed by this focus group, OPES developed a three-part questionnaire to be sent to CSRs statewide. Part One consisted of demographic questions about the CSRs themselves, their work setting, and practice. In Part Two, CSRs were asked to rate specific job tasks in terms of how often they performed the task and how important the task was to the performance of their current job. Finally, in Part Three, CSRs were asked to rate specific knowledge statements in terms of how important that knowledge is to the performance of their current job.

OPES distributed the questionnaire to 1,992 licensees. The sample consisted of active California CSRs in good standing with the Board. The responding sample size included in the data analysis was 558, or 27% of the mailed questionnaires. The respondents represented 47 of the 58 counties in California.

Once the data from the questionnaires was entered, OPES used a multiplicative model to determine a critical index for each task statement. The importance rating was used as the critical index for each knowledge statement. These critical indices were then reviewed by a second focus group who determined which tasks and knowledge statements would be retained in the examination outline. Only one task statement and one knowledge statement were eliminated. The second focus group also established the linkage between job tasks and knowledge statements for the examination outline.

The dictation examination outline is structured into five content areas, the English examination outline is structured into one content area, and the professional practice

examination outline is structured into five content areas (see Tables 11, 12, and, 13 starting on page 23). Each content area is weighted proportionately relative to other content areas. The examination outlines specify the job knowledge that a CSR is expected to master at the time of licensure. The knowledge statements in the examination outlines are listed in order of mean importance. An overview of the examination outline is presented below.

OVERVIEW OF THE THREE EXAMINATION OUTLINES

Content Area	Content Area Description
Reporting Proceedings	This area assesses the candidate's ability and knowledge to report proceedings verbatim at a prescribed speed.
Transcribing Proceedings	This area assesses the candidate's ability to produce a verbatim transcript from stenographic notes.
Research and Language Skills	This area assesses the candidate's knowledge of English grammar, punctuation, specialized vocabularies, spelling, word usage, and the use of reference sources.
Transcript Management	This area assesses the candidate's ability to maintain and distribute products and services.
Ethics	This area assesses the candidate's knowledge of ethical standards of practice.

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CHAPTER 1. INTRODUCTION

PURPOSE OF THE OCCUPATIONAL ANALYSIS

The Court Reporters Board of California (Board) requested that the Department of Consumer Affairs, Office of Professional Examination Services (OPES), conduct an occupational analysis (California Analysis) to identify critical job activities performed by Certified Shorthand Reporters (CSRs) in the State of California. The purpose of the occupational analysis is to define practice for CSRs in terms of the actual tasks and knowledge that new licensees must have in order to perform safely and competently. The results of this occupational analysis serve as the basis for the licensure examination program for CSRs in California.

CONTENT VALIDATION STRATEGY

OPES implemented a content validation strategy or methodology to ensure that the occupational analysis reflects the actual tasks and knowledge performed by CSRs. A content validation strategy establishes the job relatedness of the tasks and the associated knowledge statements by utilizing currently licensed California CSRs as subject matter experts (SMEs).

ADHERENCE TO LEGAL STANDARDS AND GUIDELINES

Several statutes, guidelines, and case law serve as standards for the basis of licensure, certification, and registration programs in California. These include the Federal Uniform Guidelines for Employee Selection, the Civil Rights Act of 1991, and Section 12944 of the California Fair Employment and Housing Act. For a licensure program to meet these standards, it must be based on the job activities that CSRs perform on the job. This report provides all the documentation necessary to verify that the analysis has been implemented in accordance with legal, professional, and technical standards.

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CHAPTER 2. SURVEY QUESTIONNAIRE

UTILIZATION OF EXPERTS

The Board identified California CSRs who represent diverse ethnic and practice settings to participate as SMEs in the focus group workshops facilitated by OPES. In the first focus group workshop, conducted in December 2008, the SMEs reviewed the tasks and associated knowledges. The SMEs determined these tasks and knowledges are a comprehensive description of the practice of CSRs in California. In the second focus group workshop, conducted in December 2009, a different group of SMEs reviewed the results from the survey questionnaire and developed the three examination outlines.

LIST OF JOB TASKS AND KNOWLEDGE STATEMENTS

OPES conducted site and telephone interviews with eight CSRs. During these interviews, OPES asked licensees to identify the tasks specific to CSRs that are performed on the job and the knowledge needed to perform these tasks.

Following the telephone interviews, OPES conducted two focus groups. During the first focus group, CSRs were asked to review and refine the information obtained from the interviews. The licensees were asked to identify major content areas of practice and the job tasks performed in each content area. The licensees were also asked to identify the knowledge necessary to perform each job task safely and competently. The focus group reviewed and refined the list of job tasks and knowledge statements to ensure it accurately captured job tasks and knowledge statements performed by CSRs. The group also evaluated the technical and conceptual accuracy and comprehensiveness of the content areas. The groups determined whether the scope of the task and knowledge statements was independent and nonoverlapping.

Following the review performed by the focus group, OPES developed a pilot questionnaire based on the demographic information and the list of job tasks and knowledge statements developed in the focus group. The pilot questionnaire was sent to 12 CSRs who participated in the interviews and focus group workshop. These licensees were asked to evaluate the pilot questionnaire and provide feedback about the questionnaire before the Board mailed the final questionnaire out to all licensees. A total of 9 licensees returned the pilot questionnaire.

In March 2009, the Board requested the addition of two task statements. OPES e-mailed copies of the tasks and knowledge statements that had been generated by the Board to CSR SMEs who attended the workshop. As a result of SMEs' input, two task and knowledge statements were added to the final version of the survey prior to distribution.

Next, OPES developed a final questionnaire based on the demographic information, the list of job tasks and knowledge statements developed by the focus group, and the information provided by licensees from the pilot questionnaire. Appendices A and B

display the cover letter and questionnaire that the Board mailed to the California CSRs selected to receive this survey.

DISTRIBUTION OF QUESTIONNAIRE AND RESPONSE RATE

In April 2009 the Board mailed questionnaires to the entire sample (1,992) of California Certified Shorthand Reporters. These CSRs were asked to provide general background information about themselves and their practice. The identified recipients of the questionnaire are in good standing.

Further, the respondents were asked to rate each job task in the content areas of Reporting Proceedings, Transcribing Proceedings, Research and Language Skills, Transcript Management, and Ethics in terms of how often they performed the job task (FREQUENCY) and how important the job task was to performance of their current job (IMPORTANCE).

Similarly, respondents were asked to rate each knowledge statement in the content areas of Reporting Proceedings, Transcribing Proceedings, Research and Language Skills, Transcript Management, and Ethics in terms of how important the knowledge is to the performance of their current job (IMPORTANCE) and when is the knowledge needed to perform the tasks in their current job (WHEN NEEDED).

The recipients received the questionnaire and a self-addressed stamped envelope to return the completed questionnaire to the Board for analysis. The Board requested all completed surveys be returned by May 17, 2009 to be included in the analysis. Appendices A and B display the cover letter and the questionnaire.

A total of 558 (27%) of the mailed questionnaires were returned. Appendix C presents the respondents by county and region.

CHAPTER 3. SURVEY RESULTS

SURVEY RESULTS OVERVIEW

California CSRs were asked to complete the three-part questionnaire. In Part One, respondents answered general background questions about themselves, their work setting, and practice. In Part Two, CSRs were asked to rate each specific job task in terms of: (1) How often they perform the task (FREQUENCY) and (2) How important the task is to performance of their current job (IMPORTANCE). Similarly in Part Three, CSRs were asked to rate specific knowledge statements in terms of: (1) How important a knowledge (IMPORTANCE) is to performance of their current job; and (2) when the knowledge is needed for performance of the tasks in their current job (WHEN NEEDED).

RELIABILITY OF RATINGS

All ratings from the questionnaire were evaluated with a standard index of reliability called coefficient alpha (α). Coefficient alpha is an estimate of internal-consistency reliability of the respondents' ratings of job tasks and knowledge statements in the questionnaire. Coefficients were calculated for all respondent ratings and knowledge statements.

The task FREQUENCY scale was reliable ($\alpha = .73$). The task IMPORTANCE scale was reliable ($\alpha = .73$). The overall reliability indicates that the responding CSRs rated the task statements consistently throughout the questionnaire.

The knowledge IMPORTANCE scale was highly reliable ($\alpha = .90$). The high reliability indicates that the responding CSRs rated the knowledge statements consistently throughout the questionnaire.

DEMOGRAPHIC RESULTS

The responding California CSRs can be described in terms of the following demographic data (see Figures 1 – 15 and Tables 3 – 12, starting on page 7):

- 58% describe their primary work classification as Freelance Reporter
- 51% work in a private reporting firm setting
- 39% have been licensed 11 to 20 years
- 50% work 40 hours or more per week as a CSR
- 55% spend the majority of a time reporting in depositions
- 94% work in an urban location
- 64% attended a court reporting school

The results from the Personal Data Section questions 1 through 21 are displayed in the following figures and tables. The results of the respondents by county can be seen in Appendix C.

FIGURE 1 – JOB CLASSIFICATION

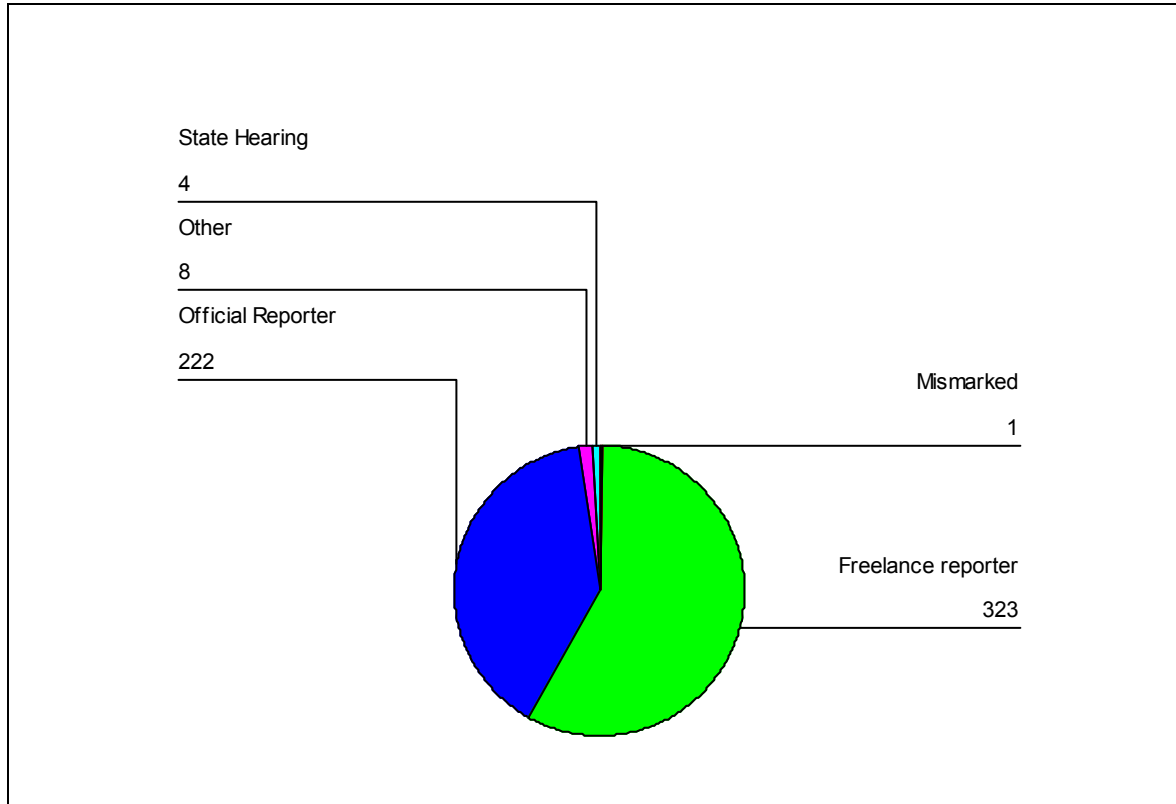


FIGURE 2 – TYPE OF PRIMARY WORK SETTING

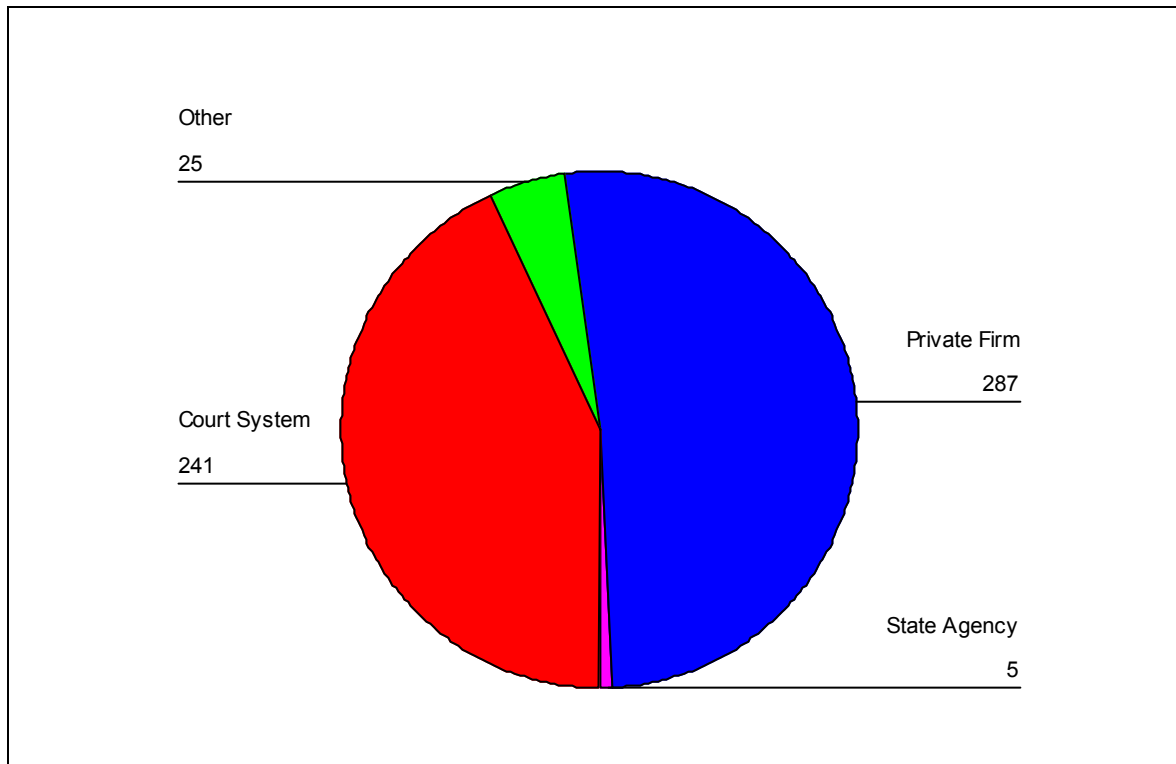


FIGURE 3 – NUMBER OF YEARS AS A CERTIFIED SHORTHAND REORTER

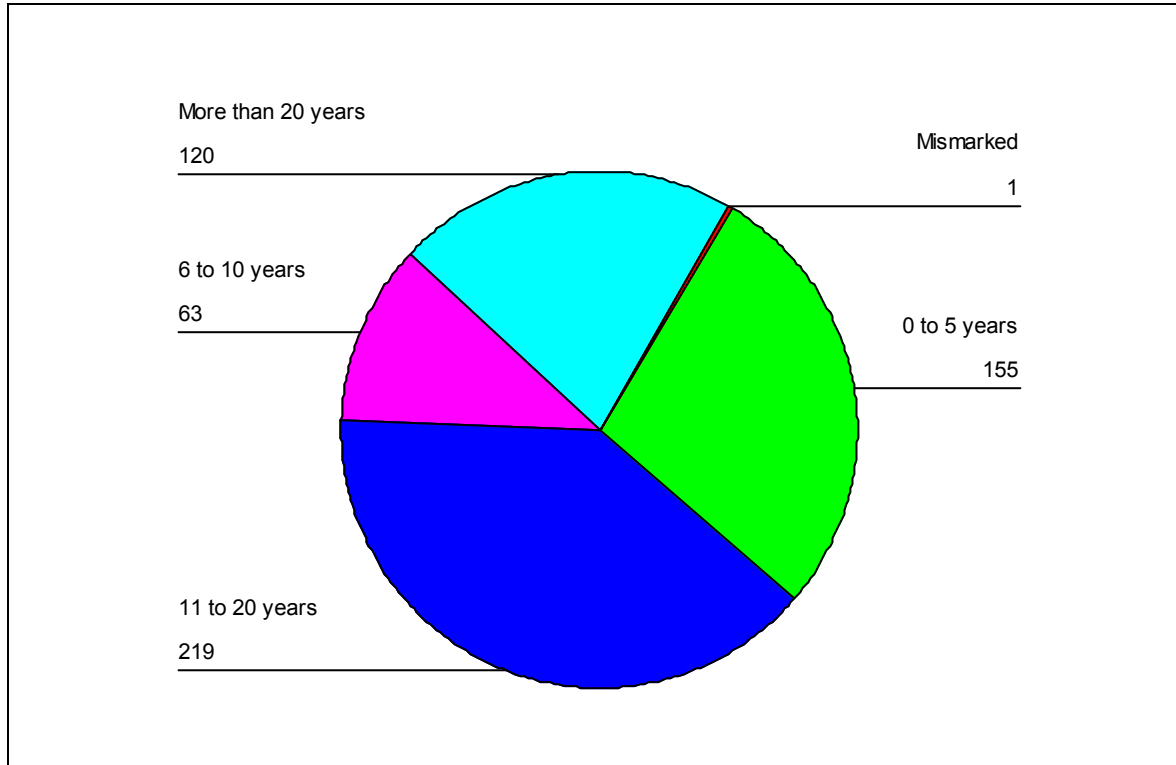


FIGURE 4 – HOURS WORKED PER WEEK AS A CERTIFIED SHORTHAND REPORTER

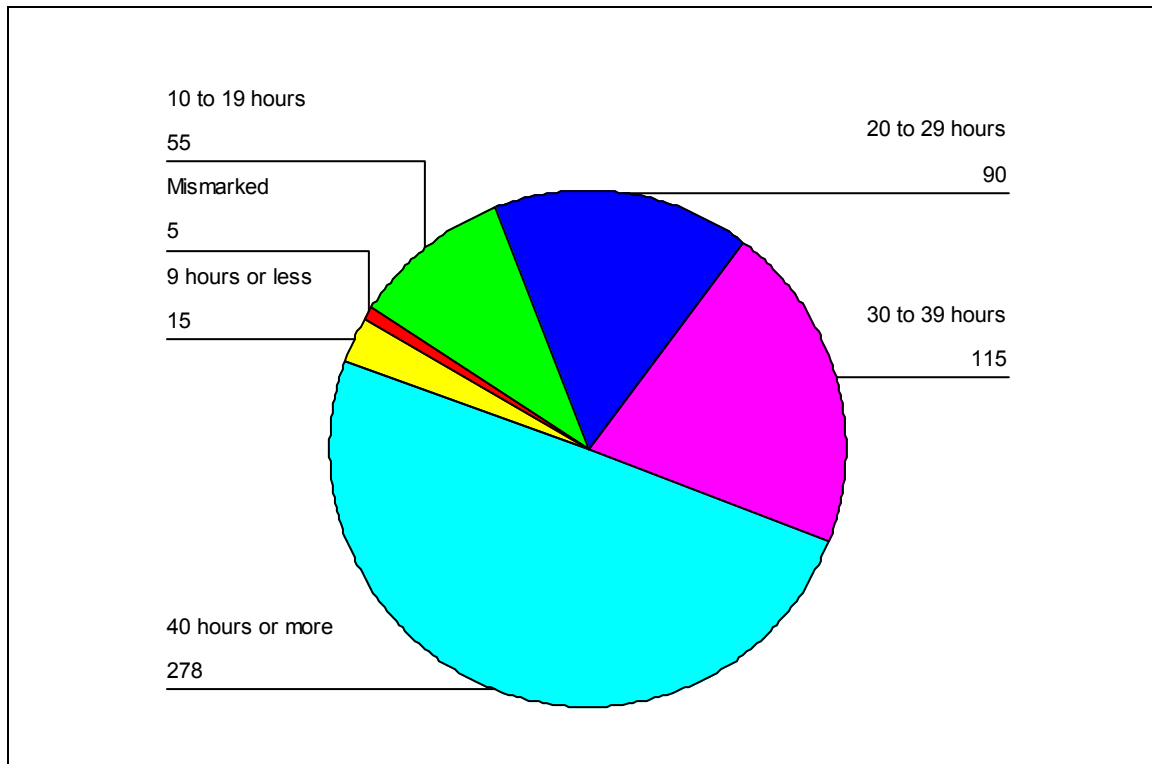


FIGURE 5 – MAJORITY TYPE OF REPORTING

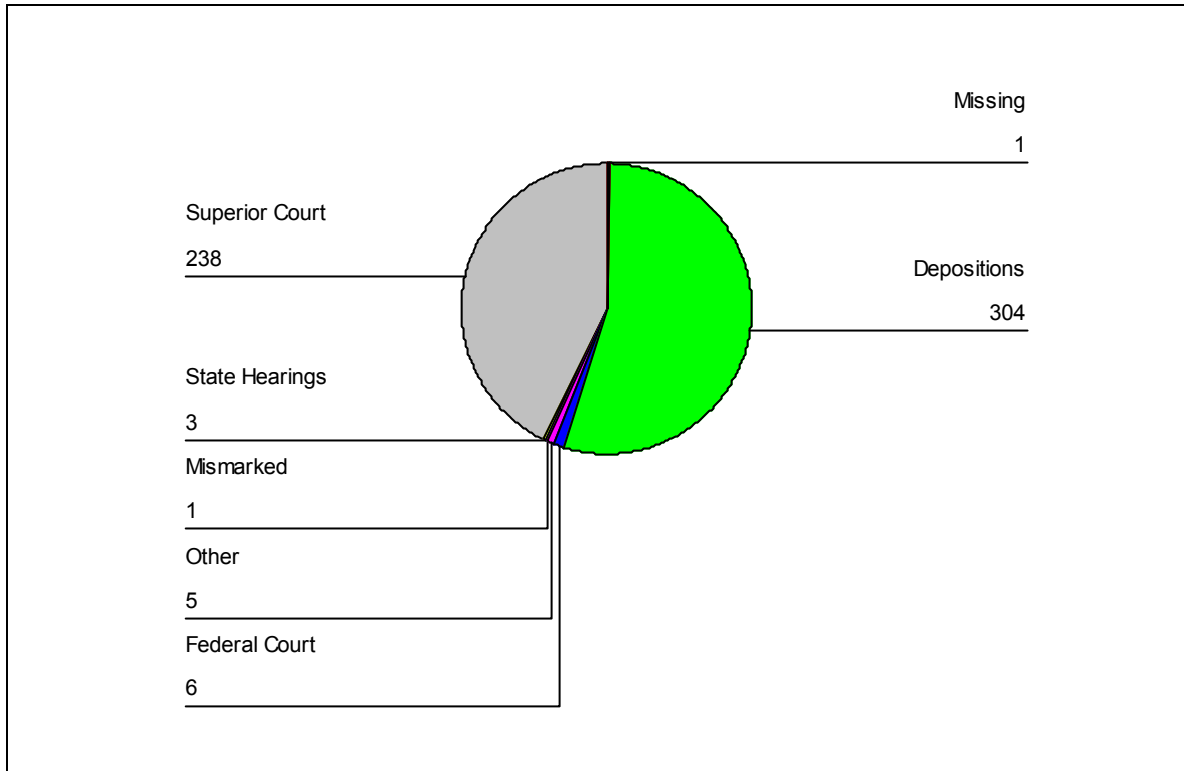


FIGURE 6 – METHODS USED AS PRIMARY MEANS OF TRANSCRIPTION

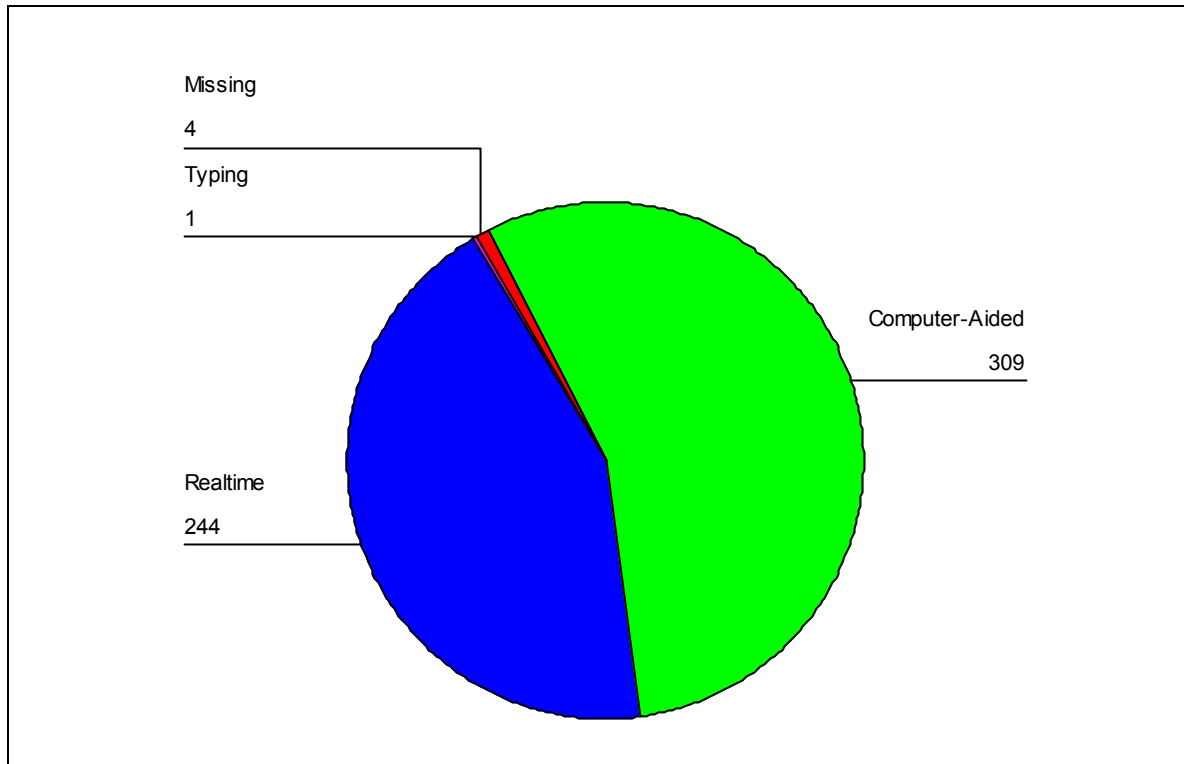


FIGURE 7 – LOCATION OF PRIMARY WORK SETTING

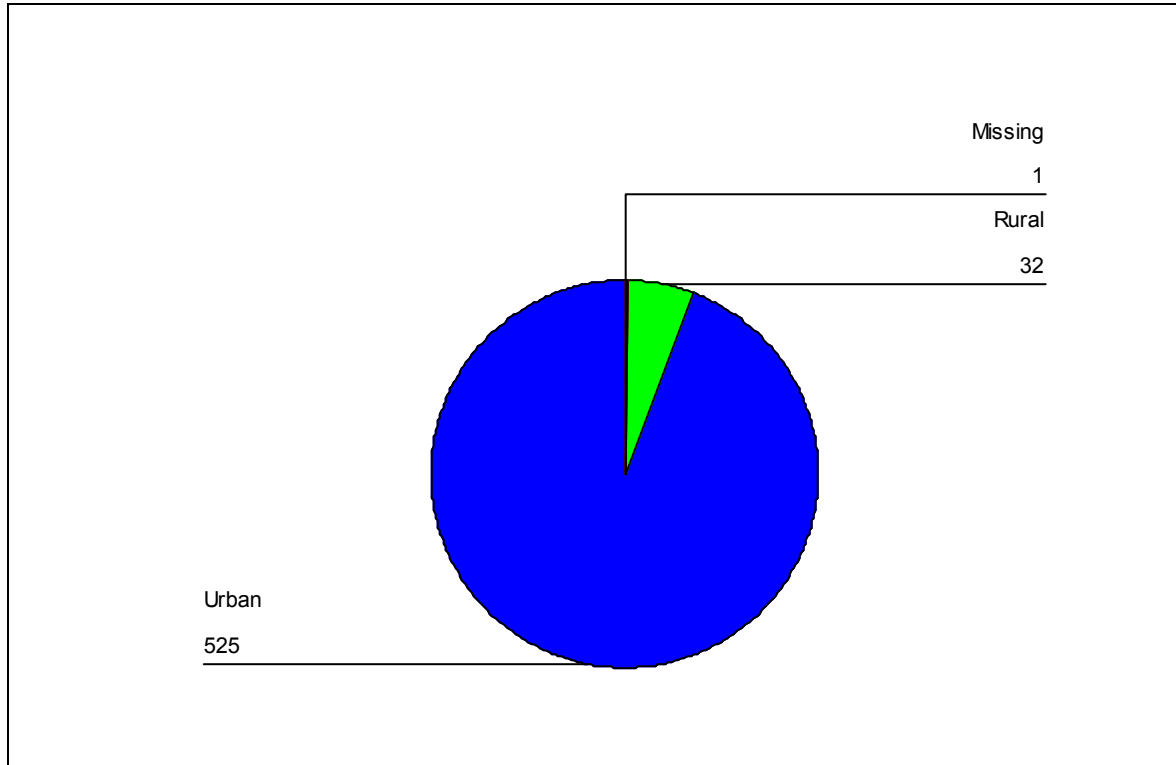


FIGURE 8 – HIGHEST LEVEL OF EDUCATION ACHIEVED

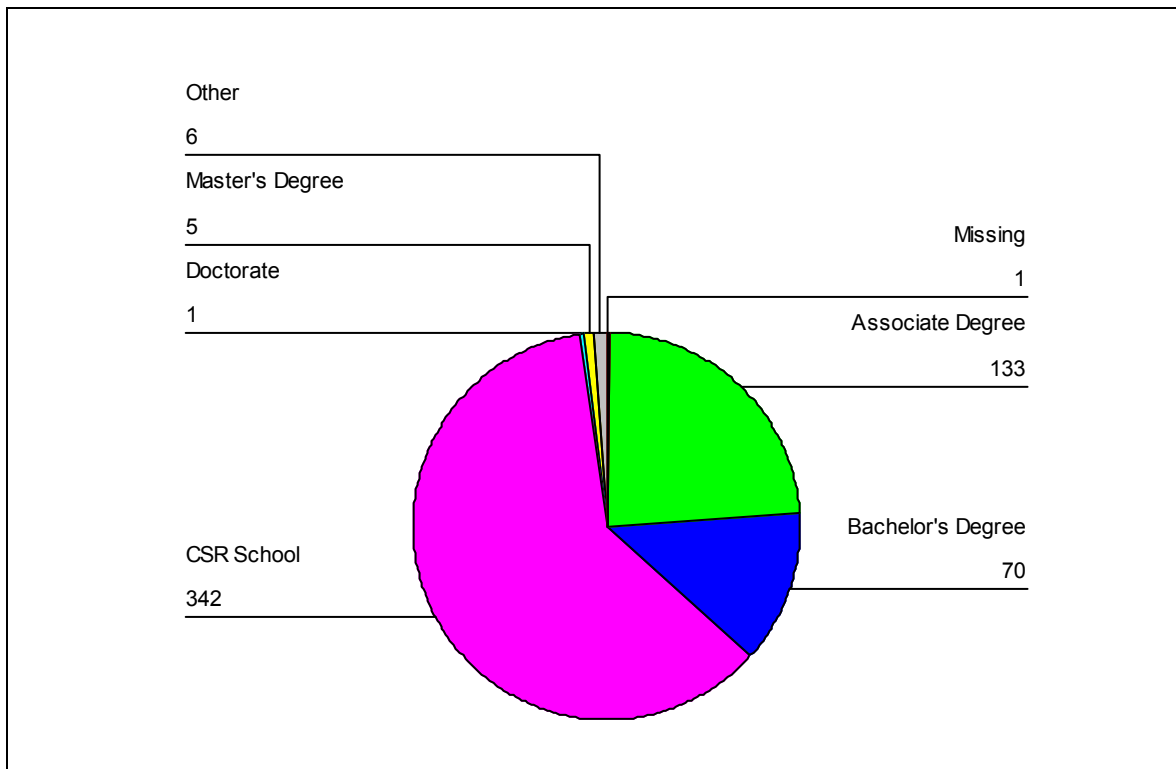


FIGURE 9 – REGION OF PRACTICE

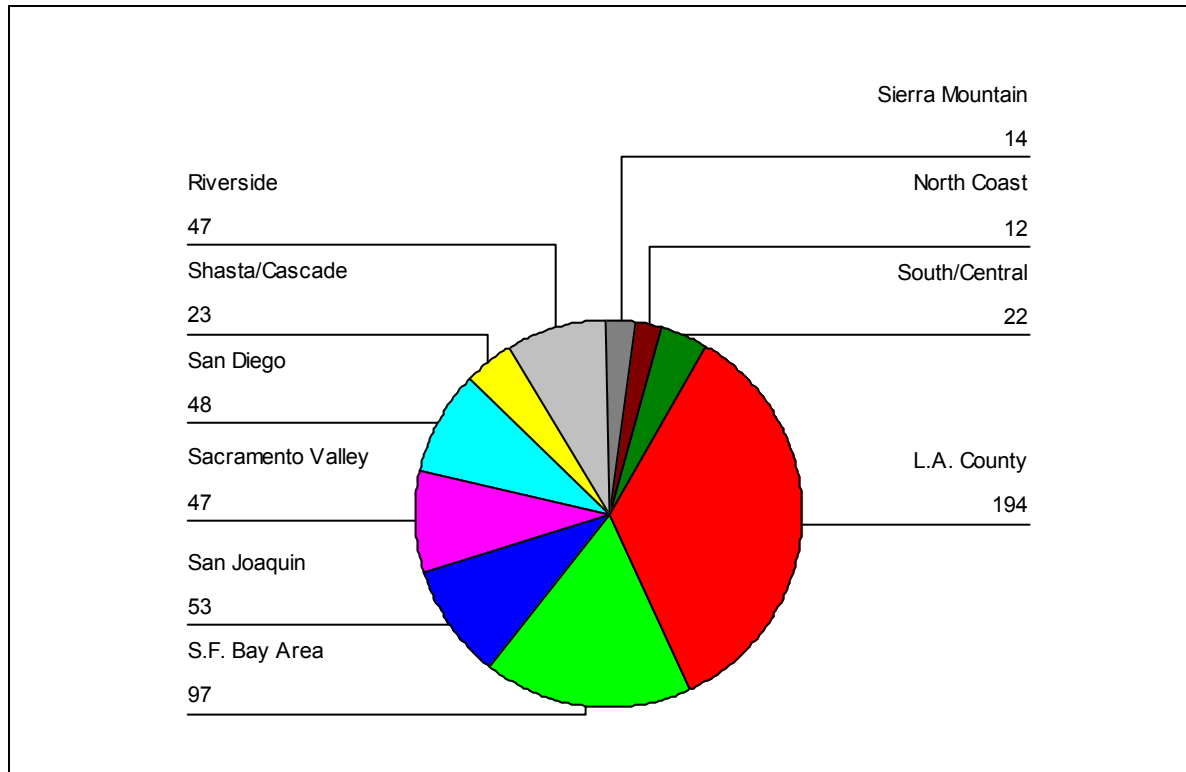


FIGURE 10 – UTILIZATION OF PERSONS TO ASSIST IN TRANSCRIPTION

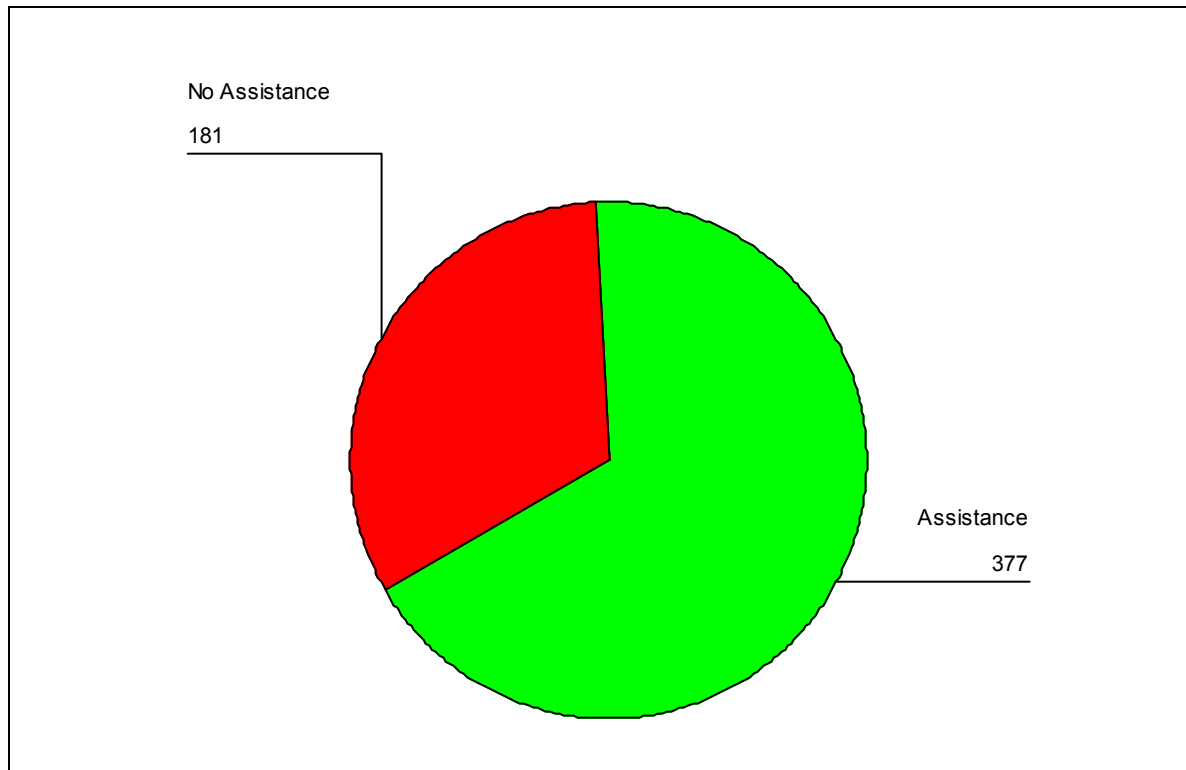


FIGURE 11 – NOTE READER UTILIZED

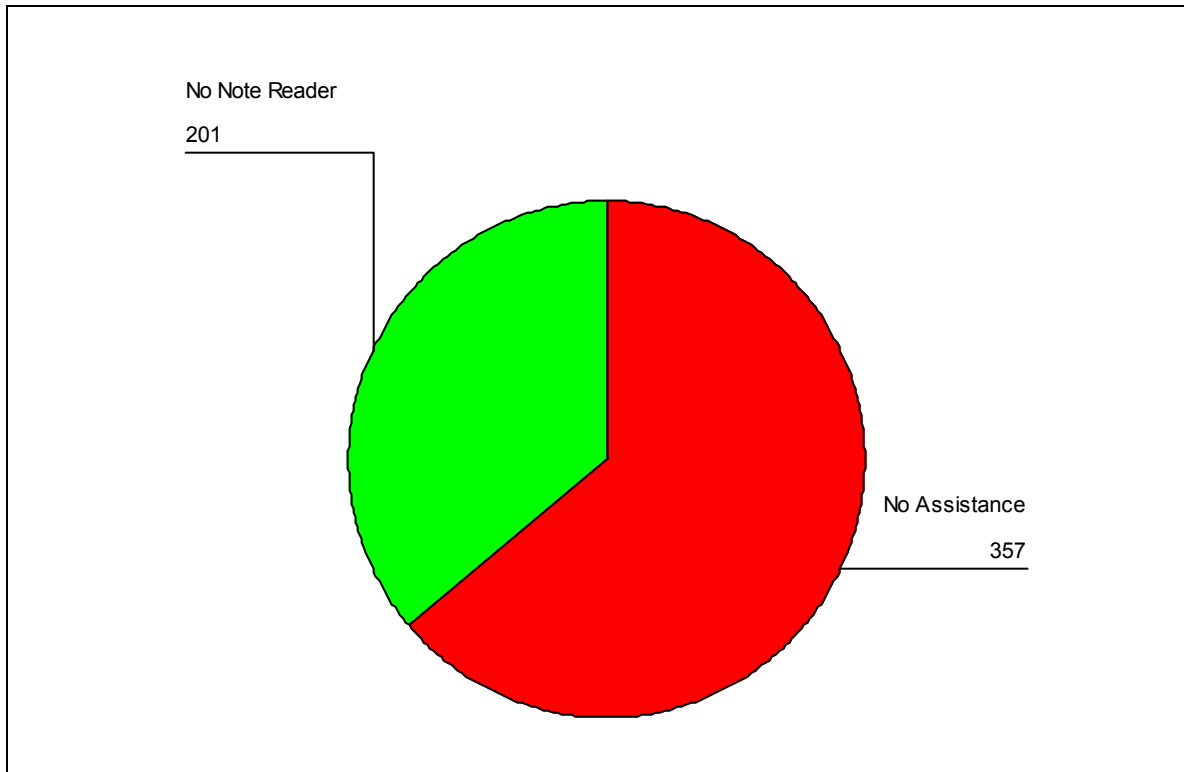


FIGURE 12 – SCOPIST

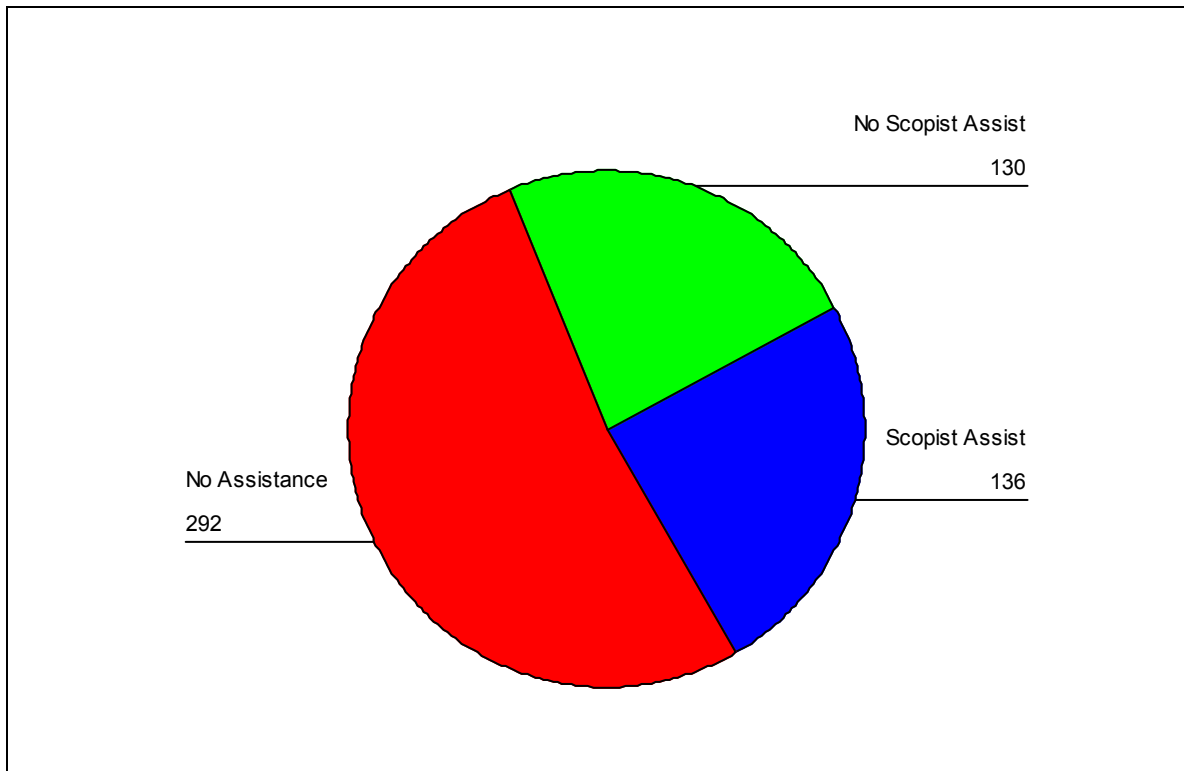


FIGURE 13 –PROOFREADER

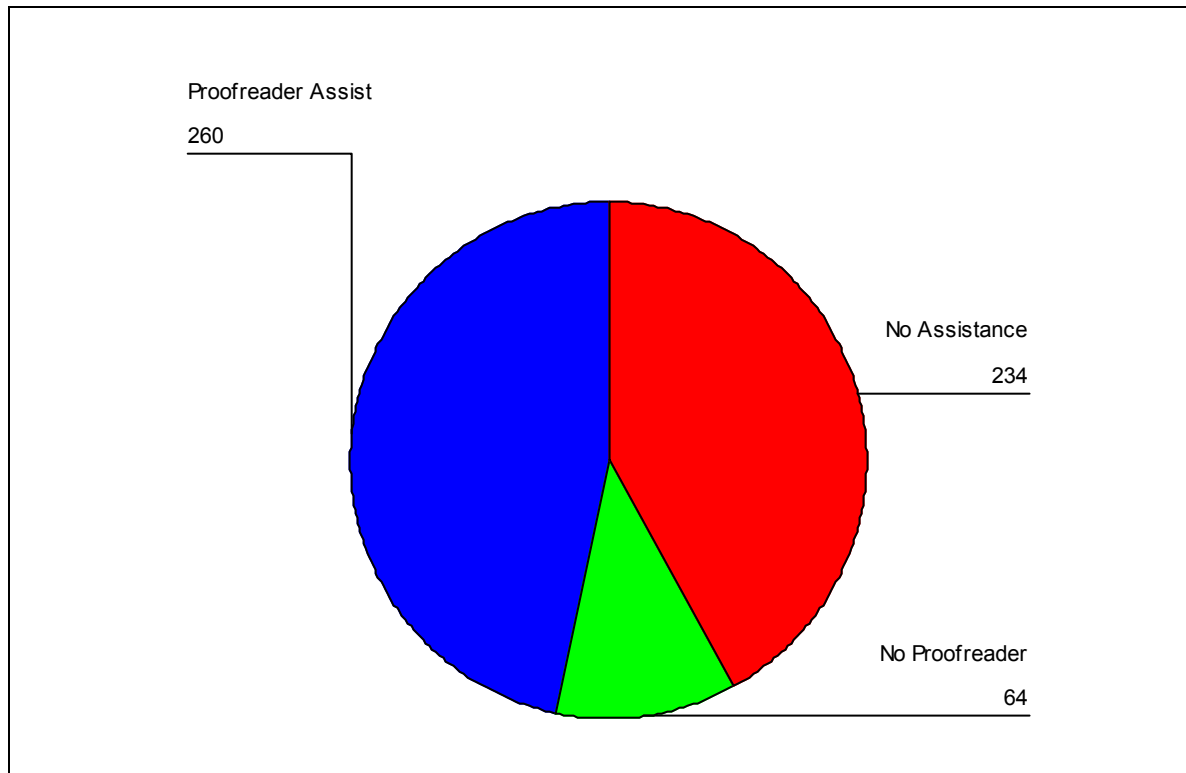


FIGURE 14 – AGENCY

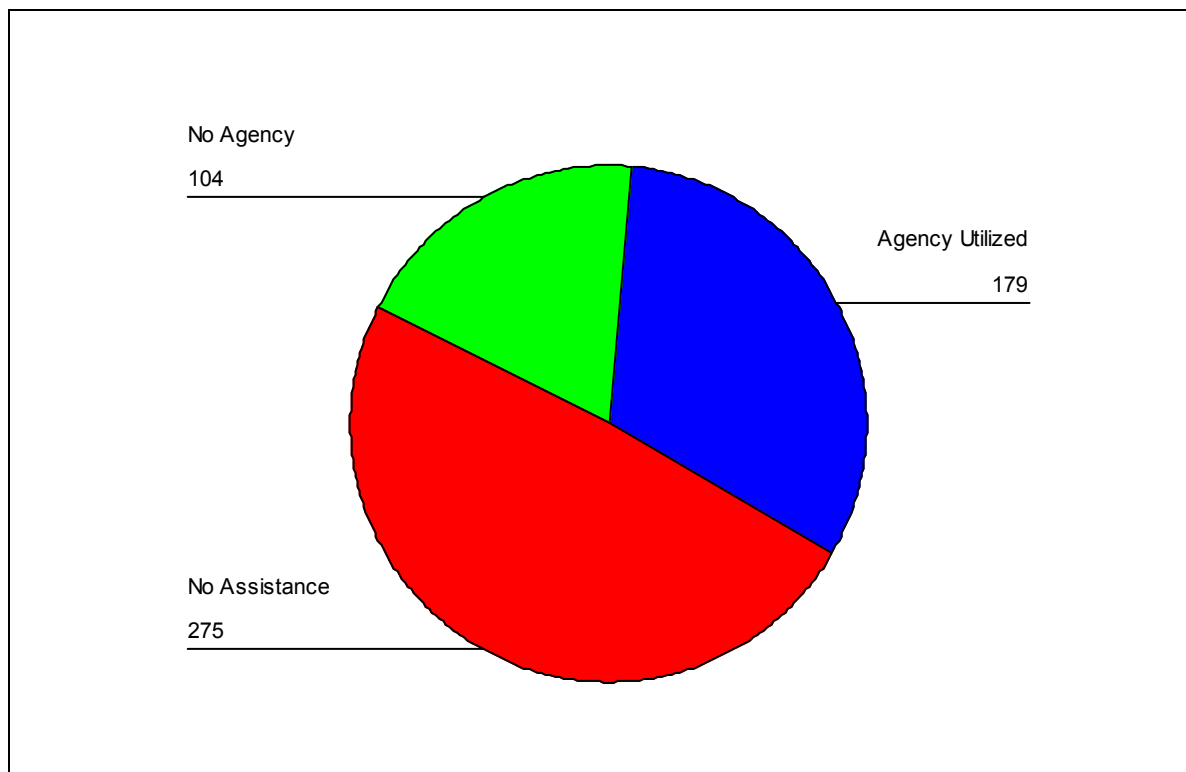


FIGURE 15 – PRODUCTION ASSISTANT

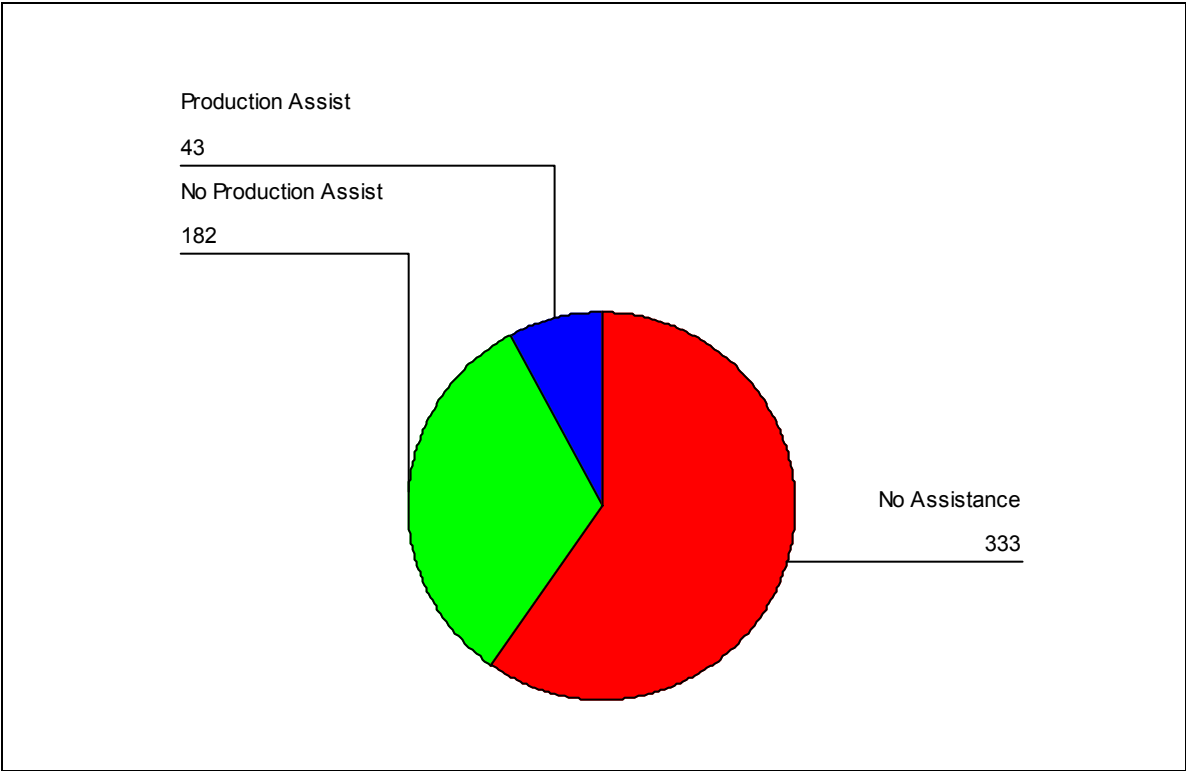


TABLE 1 – JOB CLASSIFICATION

Job Classification	Number of Respondents	Percent
Official Court Reporter	222	39.8
Freelance Reporter	323	57.9
State Hearing Reporter	4	0.7
Other	5	1.4
Mismarked	1	0.2
Total	558	100

TABLE 2 – TYPE OF PRIMARY WORK SETTING

Work Setting	Number of Respondents	Percent
Court System	241	43.2
State Agency	5	0.9
Private Reporting Firm	287	51.4
Other	25	4.5
Total	558	100

TABLE 3 – NUMBER OF YEARS AS A CERTIFIED SHORTHAND REPORTER

Years	Number of Respondents	Percent
0 to 5 years	155	27.8
6 to 10 years	63	11.3
11 to 20 years	219	39.2
More than 20 years	120	21.5
Mismarked	1	.02
Total	558	100

TABLE 4 – HOURS WORKED PER WEEK AS A CERTIFIED SHORTHAND REPORTER

Hours	Number of Respondents	Percent
9 hours or less	15	2.7
10 – 19 hours	55	9.9
20 – 29 hours	90	16.1
30 – 39 hours	115	20.6
40 hours or more	278	49.8
Mismarked	5	0.9
Total	558	100

TABLE 5 – MAJORITY TYPE OF REPORTING

Type of Reporting	Number of Respondents	Percent
Depositions	304	54.5
Federal Court	6	1.1
Superior Court	238	42.7
State Hearings	3	0.5
Other	5	0.9
Missing	1	0.2
Total	558	99.9

*Note: Percentages may not add to 100 due to rounding.

TABLE 6 – METHODS USED AS PRIMARY MEANS OF TRANSCRIPTION

Means of Transcription	Number of Respondents	Percent
Computer-Aided	309	55.4
Realtime	244	43.7
Typing	1	0.2
Missing	4	0.7
Total	558	100

TABLE 7 – LOCATION OF PRIMARY WORK SETTING

Location	Number of Respondents	Percent
Urban	525	94.1
Rural	32	5.7
Missing	1	0.2
Total	558	100

TABLE 8 – HIGHEST LEVEL OF EDUCATION ACHIEVED

Level of Education	Number of Respondents	Percent
Court Reporting School	342	61.3
Associate Degree	133	23.8
Bachelor's Degree	70	12.5
Master's Degree	5	0.9
Doctorate	1	0.2
Other	6	1.1
Missing	1	0.2
Total	558	100

TABLE 9 – TYPES OF COURT CASES OR DEPOSITIONS WORKED ON

	Yes		No
	Count	Percentage	
Personal injury	393	70.4	165
Family law	337	60.4	221
Business litigation	327	58.6	231
General malpractice	321	41.4	327
Medical malpractice	272	48.7	286
Employment law	259	46.4	299
Construction law	252	45.2	306
Real estate	246	44.6	309
Criminal law	242	43.4	316
Workers' compensation	232	57.9	235
Discrimination	215	38.5	343
Domestic	207	37.1	351
Arbitration and mediation	198	35.5	360
Landlord-tenant	191	34.2	367
Law and motion	181	32.4	377
Witness statements	181	32.4	377
Probate	173	31.0	385
Juvenile	172	30.8	386
Medical examinations	167	29.9	391
Mental health	147	26.3	411
Legal malpractice	146	26.7	409
Product liability	144	25.8	414
Bankruptcy	142	25.4	416
Dependency law	134	24.0	424
Environmental	116	20.8	442
Patents and trademarks	115	20.6	443
Public and private hearings	115	20.6	443
Administrative law	114	20.4	444
Law enforcement	112	20.1	446
Intellectual property	108	19.4	450
Forensic	103	18.5	455
Competency hearings	80	14.3	478
Conventions and meetings	71	12.7	487
Agriculture	70	12.5	488
Entertainment	61	10.9	497
Computer Assisted Realtime Translation (CART)	48	8.6	510
Grand jury	41	7.3	517
Traffic court	37	6.6	521
Maritime	33	5.9	525
Oil and gas	30	5.4	528
Tax law	28	5.0	530
Public interest	24	4.3	534
Transportation law	15	2.7	543
Immigration	14	2.5	544
Legislative	8	1.4	550
Military law	4	0.7	554
Broadcast captioning	1	0.2	557

TABLE 10 – REGION OF PRACTICE

Region	Number of Respondents	Percent
Los Angeles/Orange	194	35
San Francisco Bay Area	97	17
San Joaquin Valley	53	10
Sacramento Valley	47	8
San Diego and Vicinity	48	9
Shasta/Cascade	23	4
Riverside and Vicinity	47	8
Sierra Mountain Valley	14	3
North Coast	12	2
South/Central Coast	22	4
Total	558	100

CHAPTER 4. DEVELOPMENT OF EXAMINATION OUTLINES

USE OF CRITICAL INDICES

The critical indices for the job tasks and knowledge statements were used as guidelines by the second focus group of CSRs to establish the criticality of individual statements and evaluate the consequences of selecting a particular “cutoff” value.

CRITICAL TASK INDEX

To obtain a critical task index for each job task (j), the frequency (F_i) and importance (I_i) ratings for each individual (i) were multiplied and then averaged.

$$\text{Critical task index}_j = \text{mean} [(F_i) \times (I_i)]$$

The second focus group of CSRs evaluated the tasks indices and selected a mean critical index value of 3.06 as the boundary above which tasks would be retained and below which tasks would be eliminated. One task was eliminated (see shaded items in Appendix D).

CRITICAL KNOWLEDGE INDEX

To obtain a critical knowledge index for each knowledge statement, the mean importance (I_i) ratings for each knowledge statement was calculated.

$$\text{Critical knowledge index}_i = \text{mean} (I_i)$$

The second focus group of CSRs who evaluated the task indices also evaluated the knowledge indices and selected a mean critical index value of 1.85 as the boundary above which knowledge statements would be retained and below which statements would be eliminated. One knowledge statement was eliminated (see shaded items in Appendix E).

LINKAGE OF KNOWLEDGE STATEMENTS TO JOB TASKS AND ASSIGNMENT TO EXAMINATION TYPE

The next step in the development of each examination outline was to determine which task and knowledge statements should be included in the outline. The second group of CSRs established a linkage between job tasks and knowledge statements for the examination outlines. The focus group achieved the linkage by assigning specific knowledge statements to specific job tasks so that every task had a set of knowledge statements associated with it, and every knowledge statement was associated with at least one task.

The last step in the development of the examination outlines was to determine which tasks and knowledge statements were best suited for the Dictation, English, and Professional Practice examinations. This step was completed by the same panel of CSRs who evaluated the results of the critical indices.

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CHAPTER 5. EXAMINATION OUTLINES

OVERVIEW OF EXAMINATION OUTLINES

The dictation examination outline is structured into five content areas, the English examination outline is structured into one content area, and the professional practice examination outline structured into five content areas (see Tables 11,12, and 13, starting on page 23). The examination outlines specify the job tasks that a CSR is expected to master at the time of licensure. Examinations should be based directly on the examination outlines.

CONTENT AREA WEIGHTS FOR THE EXAMINATION

The relative weight of the content area in the examination outline represents the sum of the critical task indices for a content area divided by the overall sum of the critical task indices for all tasks. For example, if the sum of the critical task indices for content area “III. Research and Language Skills” in the examination outline for professional practice is 58.29, the weight of that content area (11%) is calculated by dividing the sum of the critical task indices (58.29) by the overall sum of the critical task indices (525.89).

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Table 11 - Summary of content areas of the Dictation Examination

<i>Content Area</i>	<i>Number of Tasks Statements in Content Area</i>	<i>Task Indices in Content Area</i>	<i>Number of Knowledge Statements in Content Area</i>	<i>Area Weight (%)</i>
I. Reporting Proceedings	2	49.38	7	16%
II. Transcribing Proceedings	5	108.34	5	35%
III. Research and Language Skills	4	90.67	6	29%
IV. Transcript Management	1	23.65	2	7%
V. Ethics	2	39.81	5	13%
Total	14	311.85	25	100%

Table 12 - Summary of the content areas for the English Examination

<i>Tasks Statements</i>	<i>Task Indices</i>	<i>Area Weight (%)</i>
III. Research and Language Skills		
T22. Check spelling on transcripts to ensure documents are free of typographical and/or homonym-type errors.	24.09	100%
T16. Punctuate transcript to accurately reflect the proceedings.	24.09	
T21. Proofread the transcript for correct punctuation and to ensure all testimony given has been captured.	23.98	
Total	72.16	100%

Table 13 - Summary of the content areas for the Professional Practice Examination

Content Area	Number of Tasks Statements in Content Area	Task Indices in Content Area	Number of Knowledge Statements in Content Area	Area Weight (%)
I. Reporting Proceedings	11	205.07	18	39%
II. Transcribing Proceedings	5	106.21	8	20%
III. Research and Language Skills	3	58.29	5	11%
IV. Transcript Management	4	73.45	12	14%
V. Ethics	4	82.87	5	16%
Total	27	525.89	48	100%

NARRATIVE DESCRIPTION OF CONTENT AREAS

Narrative descriptions were developed for each content area to provide a broad perspective of each area in terms of a defining theme. The examination outline presented in Table 14 includes these narrative descriptions. The task and knowledge statements within each examination outline are listed in descending order of criticality.

TABLE 14 – OVERVIEW OF THE EXAMINATION OUTLINES

Content Area	Content Area Description
Reporting Proceedings	This area assesses the candidate's ability and knowledge to report proceedings verbatim at a prescribed speed.
Transcribing Proceedings	This area assesses the candidate's ability to produce a verbatim transcript from stenographic notes.
Research and Language Skills	This area assesses the candidate's knowledge of English grammar, punctuation, specialized vocabularies, spelling, word usage, and the use of reference sources.
Transcript Management	This area assesses the candidate's ability to maintain and distribute products and services.
Ethics	This area assesses the candidate's knowledge of ethical standards of practice.

III. Research and Language Skills (11%) - This area assesses the candidate's knowledge of English grammar, punctuation, specialized vocabularies, spelling, word usage, and the use of reference sources.

<i>Job Task</i>	<i>Associated Knowledge Statements</i>
T24. Research the use and spelling of medical and legal terminology and verify spelling of technical terms used during testimony.	K29. Knowledge of legal terminology and spelling. K30. Knowledge of medical terminology and spelling. K33. Knowledge to recognize and correct homonym-type errors.
T23. Research obscure or unknown terms mentioned during testimony to ensure accuracy.	K28. Knowledge of English language vocabulary. K29. Knowledge of legal terminology and spelling. K30. Knowledge of medical terminology and spelling. K33. Knowledge to recognize and correct homonym-type errors.
T20. Find citations stated on the record to ensure spelling is correct.	K29. Knowledge of legal terminology and spelling. K32. Knowledge of research methods to verify citations, spelling of medical, legal, and technical terminology, and correct word and punctuation usage.

IV. Transcript Management (14%) - This area assesses the candidate's ability to maintain and distribute products and services.

<i>Job Task</i>	<i>Associated Knowledge Statement</i>
T27. Retain stenographic notes and records of proceedings in a secure manner that ensures future accessibility.	K34. Knowledge of methods and media to back up data. K45. Knowledge of the maintenance and disposition of stenographic notes.
T26. Prepare and deliver transcripts in accordance with the Code.	K41. Knowledge of time limits required to produce and deliver finished transcripts. K39. Knowledge of court reporting software to facilitate producing an electronic file. K36. Knowledge of the manner in which to make the required formatting distinctions between rough drafts and certified copies. K44. Knowledge of the requirements pertaining to the filing of sealed court transcripts. K35. Knowledge of the practices to copy and attach exhibits to original and certified copies of transcripts. K40. Knowledge of Code of Civil Procedure as it pertains to the witness's reading and signing the transcript. K42. Knowledge of the procedures regarding witness review of the original deposition transcript. K43. Knowledge of the laws regarding the sale of products and services.
T28. Bill products and services in accordance with applicable statutes.	K43. Knowledge of the laws regarding the sale of products and services.
T25. Fulfill requests for rough draft transcripts pursuant to Code or other relevant requirements.	K39. Knowledge of court reporting software to facilitate producing an electronic file. K38. Knowledge of the basic operating functions of Computer-Aided Transcription (CAT) software to electronically send rough drafts to users including clients, proofreader, and court personnel. K36. Knowledge of the manner in which to make the required formatting distinctions between rough drafts and certified copies. K37. Knowledge of the methods to deliver rough draft transcripts. K43. Knowledge of the laws regarding the sale of products and services.

V. Ethics (16%) - This area assesses the candidate's knowledge of ethical standards of practice.

Job Task	Associated Knowledge Statement
T29. Adhere to the statutes outlined in the Business & Professions Code as they pertain to performing tasks required of Certified Shorthand Reporters.	K46. Knowledge of the Code provisions concerning confidentiality of proceedings. K47. Knowledge of notification procedures when any part of a transcript is requested by a party to the proceeding. K48. Knowledge of the requirements to act impartially toward all parties to a proceeding. K49. Knowledge of the Professional Standards of Practice. K50. Knowledge of Codes pertaining to disclosure of conflicts of interest.
T31. Maintain impartiality and confidentiality in accordance with applicable Codes.	K46. Knowledge of the Code provisions concerning confidentiality of proceedings. K47. Knowledge of notification procedures when any part of a transcript is requested by a party to the proceeding. K48. Knowledge of the requirements to act impartially toward all parties to a proceeding. K49. Knowledge of the Professional Standards of Practice. K50. Knowledge of Codes pertaining to disclosure of conflicts of interest.
T30. Practice and apply state and local Rules of Court and applicable statutes.	K46. Knowledge of the Code provisions concerning confidentiality of proceedings. K47. Knowledge of notification procedures when any part of a transcript is requested by a party to the proceeding. K49. Knowledge of the Professional Standards of Practice. K50. Knowledge of Codes pertaining to disclosure of conflicts of interest.
T32. Utilize Backup Audio Media (BAM) in accordance with applicable standards.	K46. Knowledge of the Code provisions concerning confidentiality of proceedings. K47. Knowledge of notification procedures when any part of a transcript is requested by a party to the proceeding. K48. Knowledge of the requirements to act impartially toward all parties to a proceeding.

CHAPTER 6. CONCLUSIONS

The occupational analysis of the CSRs described in this report provides a comprehensive description of current practice in California. The procedures of the occupational analysis are based upon a content validation strategy to ensure that the results accurately represent the practice of certified shorthand reporting in California.

By adopting the CSR examination outline contained in this report, the Board ensures that their examination program reflects current practice. This report provides all documentation necessary to verify that the analysis has been implemented in accordance with legal, professional, and technical standards.

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APPENDIX A – COVER LETTER TO THE
CERTIFIED SHORTHAND REPORTER

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Court Reporters Board of California

2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833
Toll Free Phone: 877-3ASKCRB (327-5272) • Fax: (916) 263-3664
www.courtreportersboard.ca.gov



April 17, 2009

Dear CSR:

You have been randomly selected to participate in the 2009 Court Reporters' Occupational Analysis. On behalf of the Court Reporters Board, I would like to thank you in advance for taking the time to participate. Your open and honest responses to the enclosed questionnaire will help form the foundation of future CSR exams.

By way of background, state licensing boards are mandated to protect the public by developing licensing examinations that determine competency for licensure. The examinations require candidates to demonstrate that they possess the knowledge, skills and abilities that the professional community defines as being necessary to perform safely and effectively in independent practice. The enclosed questionnaire was developed by the Department of Consumer Affairs' testing experts from interviews with CSRs and from a structured formal workshop of additional CSRs. These CSRs are officials, freelance reporters and a CSR school official, all having various levels of licensing experience in the field.

The Court Reporters Board now needs your help. By completing and returning the questionnaire, you will help us identify the knowledge that licensed CSRs need on the job. Your responses will be combined with those of other licensed reporters to determine trends. Your individual responses will be kept confidential.

Your participation is essential to the success of the Occupational Analysis, and your contribution will help ensure that future court reporters are qualified to practice.

Again, thank you for your time and input. If you have any questions, please contact Kim Kale at (916) 263-3662 or Kim_Kale@dca.ca.gov.

Sincerely,

Yvonne Fenner
Executive Officer

**Please complete each item in the questionnaire and return it
in the postage pre-paid envelope no later than
May 15, 2009**

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APPENDIX B – QUESTIONNAIRE

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OCCUPATIONAL ANALYSIS OF CERTIFIED SHORTHAND REPORTERS

The Court Reporters Board of California is currently conducting an occupational analysis of the certified shorthand reporter (CSR) profession. The purpose of the occupational analysis is to identify the important tasks that are currently performed by practicing CSRs and the knowledge required to perform those tasks. Results of the occupational analysis will be used to update the definition of CSR practice and to ensure that licensing examinations reflect important aspects of current practice.

The Board is requesting your assistance in this process. By completing this questionnaire as it relates to your *current* practice, you will contribute valuable information regarding the CSR profession. Your responses on this questionnaire will be combined with the responses of other CSRs to determine the tasks and the knowledge needed for independent practice. Your individual responses will be kept confidential.

Fill out this questionnaire **only** if you are currently licensed **and** working as a CSR in California. If you are **not** currently licensed and working as a CSR, please return the survey as is in the enclosed postage paid return envelope.

This questionnaire has three sections that address your professional experience during the past year.

PART I asks for background information related to your professional experience. Information in this section will be used for demographic purposes only.

PART II asks you to rate tasks on two scales:

- (a) HOW FREQUENTLY you perform each task in your profession relative to the other tasks you perform.
- (b) HOW IMPORTANT the performance of each task is to your current practice relative to the other tasks you perform.

PART III asks you to rate knowledge statements on two scales:

- (a) HOW IMPORTANT each knowledge or skill is to your current practice.
- (b) WHEN this knowledge or skill is needed to perform your profession.

The Board recognizes that every CSR professional may not perform all of the tasks and use all of the knowledge identified in this questionnaire. However, your participation is essential to the success of this project, and your contributions will help establish standards for effective CSR practice in California.

**Please complete each item in the questionnaire and return
it in the postage-prepaid envelope no later than**

_____ May 15, 2009 _____.

THIS IS A TWO-SIDED DOCUMENT. PLEASE READ/COMPLETE BOTH SIDES OF EACH PAGE.

PART I PERSONAL DATA

The information you provide here is voluntary and confidential. It will be treated as personal information subject to the Information Practices Act (Civil Code, Section 1798 et seq.), and it will be used only for the purpose of analyzing the ratings from this questionnaire.

For items 1-8, 10, 11, and 13, check **ONLY ONE** of the choices.

1. Are you currently practicing as a Certified Shorthand Reporter in California?
 Yes
 No (If no, please return this survey uncompleted in the enclosed postage paid envelope.)
2. How would you describe your primary work classification?
 Official court reporter
 Freelance reporter
 Hearing reporter
 State hearing reporter
 Other (please specify)

3. How would you describe your primary work setting?
 Court system
 State agency
 Private reporting firm(s)
 Other (please specify)

4. How many years have you been licensed as a CSR in California?
 0 to 5 years
 6 to 10 years
 11 to 20 years
 More than 20 years
5. How many hours per week do you spend reporting and producing transcripts?
 9 hours or less
 10 to 19 hours
 20 to 29 hours
 30 to 39 hours
 40 hours or more
6. In which of the following venues do you spend the majority of your working day as a CSR?
 Depositions
 Federal court
 Superior court
 State hearings
 Other (please specify)
7. What method do you use as your primary means of transcription?
 Computer-aided
 Realtime
 Dictation
 Typing
8. Do you utilize persons to assist you in transcription, proofreading, and/or binding?
 Yes
 No
9. If yes, indicate what type of services you utilize. (Check all that apply.)
 Note-reader
 Scopist
 Proofreader
 Agency
 Production assistant

10. Which of the following settings describes the location of your primary work setting?
- Urban (greater than 50,000 people)
 - Rural (less than 50,000 people)
11. What is your highest level of education?
- On-the-job training
 - Court reporting school
 - Associate degree
 - Bachelor's degree
 - Master's degree
 - Doctorate
 - Other formal education (please specify)
-
12. Over the past year on which of the following types of court cases or depositions have you worked? (Check all that apply.)
- Administrative law
 - Agriculture
 - Arbitration and mediation
 - Bankruptcy
 - Broadcast captioning
 - Business litigation
 - Competency hearings
 - Computer Assisted Realtime Translation (CART)
 - Construction law
 - Conventions and meetings
 - Criminal law
 - Dependency law
 - Discrimination
 - Domestic
 - Employment law
 - Entertainment
 - Environmental
 - Family law
 - Forensic
 - General malpractice
 - Grand jury
 - Immigration
 - Intellectual property
 - Juvenile
 - Landlord-tenant
 - Law and motion
 - Law enforcement
 - Legal malpractice
 - Legislative
 - Maritime
 - Medical examinations
 - Medical malpractice
 - Mental health
 - Military law
 - Oil and gas
 - Patents and trademarks
 - Personal injury
 - Probate
 - Product liability
 - Public and private hearings
 - Public interest
 - Real estate
 - Tax law
 - Traffic court
 - Transportation law
 - Witness statements
 - Workers' compensation

13 In what California county is your **primary** practice located? _____

Please select **only one** of the two-digit codes below. **Only one code will be accepted.**

01	Alameda	16	Kings	31	Placer	46	Sierra
02	Alpine	17	Lake	32	Plumas	47	Siskiyou
03	Amador	18	Lassen	33	Riverside	48	Solano
04	Butte	19	Los Angeles	34	Sacramento	49	Sonoma
05	Calaveras	20	Madera	35	San Benito	50	Stanislaus
06	Colusa	21	Marin	36	San Bernardino	51	Sutter
07	Contra Costa	22	Mariposa	37	San Diego	52	Tehama
08	Del Norte	23	Mendocino	38	San Francisco	53	Trinity
09	El Dorado	24	Merced	39	San Joaquin	54	Tulare
10	Fresno	25	Modoc	40	San Luis Obispo	55	Tuolumne
11	Glenn	26	Mono	41	San Mateo	56	Ventura
12	Humboldt	27	Monterey	42	Santa Barbara	57	Yolo
13	Imperial	28	Napa	43	Santa Clara	58	Yuba
14	Inyo	29	Nevada	44	Santa Cruz		
15	Kern	30	Orange	45	Shasta		

YOU HAVE COMPLETED PART I OF THE SURVEY QUESTIONNAIRE.
GO ON TO PART II.

PART II

INSTRUCTIONS FOR RATING JOB TASKS

In this part of the questionnaire, please rate each task as it relates to your current job. Your frequency and importance ratings should be separate and independent ratings. Therefore, the ratings that you assign to one rating scale should not influence the ratings that you assign to another rating scale. For example, you may perform a task frequently, but the task may not be important.

If the task is NOT part of your job, rate the task "0" (zero) Frequency and "0" Importance.

Circle ONE rating that best fits each task. Use the rating scales on the next page to make your evaluations.

RATING SCALES FOR JOB TASKS

FREQUENCY

HOW OFTEN do you perform this task in your current job? Consider all the job tasks you have performed over the past year, and make your judgment relative to all other tasks you perform.

- 0 DOES NOT APPLY TO MY JOB. I never perform this task in my job.
- 1 RARELY. This is one of the least frequently performed tasks in my job.
- 2 SELDOM. This task is performed infrequently relative to other tasks that I perform in my job.
- 3 OCCASIONALLY. This task is performed somewhat frequently and is about average relative to all other tasks that I perform in my job.
- 4 OFTEN. This task is performed more frequently than most other tasks in my job.
- 5 VERY OFTEN. I perform this task almost constantly, and it is one of the most frequently performed tasks in my job.

IMPORTANCE

HOW IMPORTANT is performance of this task in your current job?

- 0 NOT IMPORTANT; DOES NOT APPLY TO MY JOB. This task is not important or does not apply to my job because I do not perform this task in my job.
- 1 OF MINOR IMPORTANCE. This task is of minor importance relative to other tasks; it would have the lowest priority of all the tasks that I perform in my job.
- 2 FAIRLY IMPORTANT. This task is fairly important relative to other tasks; however, it does not have the priority of most other tasks that I perform in my job.
- 3 MODERATELY IMPORTANT. This task is moderately important for effective job performance relative to other tasks; it has about average priority among all tasks that I perform in my job.
- 4 VERY IMPORTANT. This task is very important for full job performance; it has a higher degree of importance or priority than most other tasks that I perform in my job.
- 5 CRITICALLY IMPORTANT. This task is one of the most critical tasks that I perform in my job.

PLEASE REFER TO THIS PAGE TO MAKE YOUR
FREQUENCY AND IMPORTANCE RATINGS.

EXAMPLES OF TASK RATINGS

This example shows how each task statement has a frequency and an importance rating.

	TASKS	FREQUENCY	IMPORTANCE
1.	Obtain all parties' names and contact information to facilitate transcript production and distribution.	0 1 2 3 4 5	0 1 2 3 4 5
2.	Collect the daily calendar to identify the parties in the action and case numbers.	0 1 2 3 4 5	0 1 2 3 4 5
3.	Find citations stated on the record to ensure spelling is correct.	0 1 2 3 4 5	0 1 2 3 4 5

NOTE: *In task number 2, the task is not performed by the respondent (FREQUENCY=0); therefore, the task IMPORTANCE is rated zero (IMPORTANCE=0).*

FREQUENCY	IMPORTANCE
HOW OFTEN do you perform this task in your <u>current</u> job? Make your judgment relative to other tasks performed. If you do not perform the task, mark frequency as "0."	HOW IMPORTANT is performance of this task in your <u>current</u> job? If you do not perform the task, mark importance as "0."
0 - Does not apply to my job; task is not performed. 1 - Rarely 2 - Seldom 3 - Occasionally 4 - Often 5 - Very often	0 - Does not apply to my job; task is not performed. 1 - Of minor importance 2 - Fairly important 3 - Moderately important 4 - Very important 5 - Critically important

TASKS		FREQUENCY	IMPORTANCE
I. REPORT PROCEEDINGS			
1.	Collect the daily calendar to identify the parties in the action and case numbers.	0 1 2 3 4 5	0 1 2 3 4 5
2.	Obtain the case caption for transcript preparation.	0 1 2 3 4 5	0 1 2 3 4 5
3.	Obtain all parties' names and contact information to facilitate transcript production and distribution.	0 1 2 3 4 5	0 1 2 3 4 5
4.	Administer the oath to witnesses/interpreters according to the relevant Code.	0 1 2 3 4 5	0 1 2 3 4 5
5.	Cite relevant Code sections pertaining to the reporting of the official record.	0 1 2 3 4 5	0 1 2 3 4 5
6.	Mark and retain exhibits introduced during the proceedings for indexing and inclusion in the record.	0 1 2 3 4 5	0 1 2 3 4 5
7.	Identify in the record when exhibits are marked and/or received to produce the exhibit index.	0 1 2 3 4 5	0 1 2 3 4 5
8.	Utilize stenographic equipment with the fluency and speed required to capture verbatim testimony in a manner that allows for accurate transcription.	0 1 2 3 4 5	0 1 2 3 4 5
9.	Utilize speaker identification to attribute statements made on the record.	0 1 2 3 4 5	0 1 2 3 4 5
10.	Utilize realtime translation to accommodate requests of clients.	0 1 2 3 4 5	0 1 2 3 4 5
11.	Control the proceedings to ensure a verbatim record.	0 1 2 3 4 5	0 1 2 3 4 5
12.	Read back proceedings to review the record as requested.	0 1 2 3 4 5	0 1 2 3 4 5
II. TRANSCRIPTION			
13.	Translate stenographic notes to prepare the transcript.	0 1 2 3 4 5	0 1 2 3 4 5
14.	Create title, appearance, index, and certificate pages to conform to Codes.	0 1 2 3 4 5	0 1 2 3 4 5
15.	Maintain a current stenographic dictionary to facilitate transcript production.	0 1 2 3 4 5	0 1 2 3 4 5
16.	Punctuate transcript to accurately reflect the proceedings.	0 1 2 3 4 5	0 1 2 3 4 5

FREQUENCY	IMPORTANCE
HOW OFTEN do you perform this task in your <u>current</u> job? Make your judgment relative to other tasks performed. If you do not perform the task, mark frequency as "0."	HOW IMPORTANT is performance of this task in your <u>current</u> job? If you do not perform the task, mark importance as "0."
0 - Does not apply to my job; task is not performed. 1 - Rarely 2 - Seldom 3 - Occasionally 4 - Often 5 - Very often	0 - Does not apply to my job; task is not performed. 1 - Of minor importance 2 - Fairly important 3 - Moderately important 4 - Very important 5 - Critically important

TASKS		FREQUENCY	IMPORTANCE
17.	Maintain confidentiality in accordance with the prevailing Codes to help maintain all parties' rights.	0 1 2 3 4 5	0 1 2 3 4 5
18.	Ensure transcript meets Minimum Transcript Format Standards to comply with regulations.	0 1 2 3 4 5	0 1 2 3 4 5
19.	Create and deliver an electronic file of the transcript when requested or required by the Code.	0 1 2 3 4 5	0 1 2 3 4 5
III. PROOFREADING			
20.	Find citations stated on the record to ensure spelling is correct.	0 1 2 3 4 5	0 1 2 3 4 5
21.	Proofread the transcript for correct punctuation and to ensure all testimony given has been captured.	0 1 2 3 4 5	0 1 2 3 4 5
22.	Check spelling on transcripts to ensure documents are free of typographical and/or homonym-type errors.	0 1 2 3 4 5	0 1 2 3 4 5
23.	Research obscure or unknown terms mentioned during testimony to ensure accuracy.	0 1 2 3 4 5	0 1 2 3 4 5
24.	Research the use and spelling of medical and legal terminology and verify spelling of technical terms used during testimony.	0 1 2 3 4 5	0 1 2 3 4 5
IV. TRANSCRIPT MANAGEMENT			
25.	Fulfill requests for rough draft transcripts pursuant to Code or other relevant requirements.	0 1 2 3 4 5	0 1 2 3 4 5
26.	Prepare and deliver transcripts in accordance with the Code.	0 1 2 3 4 5	0 1 2 3 4 5
27.	Retain stenographic notes and records of proceedings in a secure manner that ensures future accessibility.	0 1 2 3 4 5	0 1 2 3 4 5
28.	Bill products and services in accordance with applicable statutes.	0 1 2 3 4 5	0 1 2 3 4 5
V. ETHICS			
29.	Adhere to the statutes outlined in the Business & Professions Code as they pertain to performing tasks required of certified shorthand reporters.	0 1 2 3 4 5	0 1 2 3 4 5
30.	Practice and apply state and local Rules of Court and applicable statutes.	0 1 2 3 4 5	0 1 2 3 4 5

FREQUENCY	IMPORTANCE
HOW OFTEN do you perform this task in your <u>current</u> job? Make your judgment relative to other tasks performed. If you do not perform the task, mark frequency as "0."	HOW IMPORTANT is performance of this task in your <u>current</u> job? If you do not perform the task, mark importance as "0."
0 - Does not apply to my job; task is not performed. 1 - Rarely 2 - Seldom 3 - Occasionally 4 - Often 5 - Very often	0 - Does not apply to my job; task is not performed. 1 - Of minor importance 2 - Fairly important 3 - Moderately important 4 - Very important 5 - Critically important

TASKS		FREQUENCY	IMPORTANCE
31.	Maintain impartiality and confidentiality in accordance with applicable Codes.	0 1 2 3 4 5	0 1 2 3 4 5
32.	Utilize Back-up Audio Media (BAM) in accordance with applicable standards.	0 1 2 3 4 5	0 1 2 3 4 5

YOU HAVE COMPLETED PART II OF THE SURVEY QUESTIONNAIRE.
GO ON TO PART III.

PART III INSTRUCTIONS FOR RATING KNOWLEDGE

In this part of the questionnaire, rate each of the knowledge statements based on how important you believe the knowledge is to the performance of your job tasks. If a knowledge is NOT part of your job, rate the statement "0" (zero) and go on to the next item. Once you have evaluated the importance of a knowledge statement, rate when a CSR needs to know this information. Rate the statement "0" if not needed at the time of licensure; rate "1" if needed at the time of licensure.

Circle ONE rating that best fits each knowledge statement.

RATING SCALES FOR KNOWLEDGE

IMPORTANCE

HOW IMPORTANT is this knowledge to performance of tasks in your current job?

1. DOES NOT APPLY TO MY JOB; NOT REQUIRED. This job knowledge does not apply to my job; it is not required for job performance.
2. OF MINOR IMPORTANCE. This job knowledge is of minor or incidental importance for job performance; it is useful for some minor part of my job.
3. FAIRLY IMPORTANT. This job knowledge is fairly important relative to other tasks; however, it does not have the priority of most other knowledge required in my job.
4. MODERATELY IMPORTANT. This job knowledge is moderately important for job performance in some relatively major part of my job.
5. VERY IMPORTANT. This job knowledge is very important for job performance in a significant part of my job.
6. CRITICALLY IMPORTANT. This job knowledge is critically important for job performance.

WHEN NEEDED

WHEN IS THIS KNOWLEDGE NEEDED to perform the tasks in your current job?

0. NOT NEEDED AT TIME OF LICENSURE. This job knowledge is not needed at the time of licensure; this knowledge may be acquired during job training post-licensure.
1. NEEDED AT TIME OF LICENSURE. This job knowledge is needed at the time of licensure to perform the tasks of a CSR; it is important to possess this knowledge to perform job duties.

**PLEASE REFER TO THIS PAGE TO MAKE YOUR
IMPORTANCE AND WHEN NEEDED RATINGS.**

EXAMPLES OF KNOWLEDGE RATINGS

This example shows how each knowledge statement has an importance and a when needed rating.

	KNOWLEDGE	IMPORTANCE	WHEN NEEDED
1.	Knowledge of relevant Code of Civil Procedure regarding administering the oath to witnesses and interpreters.	0 1 2 3 4 5	0 1
2.	Knowledge of certificate page requirements.	0 1 2 3 4 5	0 1
3.	Knowledge of the audio capabilities of the software to generate a recorded version of the proceedings.	0 1 2 3 4 5	0 1

***NOTE:** Knowledge number 3 is rated zero because it is not part of the respondent's job.*

IMPORTANCE	WHEN NEEDED
<p>HOW IMPORTANT is performance of this task in your current job?</p> <p>0 - Does not apply to my job; not required for job performance. 1 - Of minor importance or incidental performance. 2 - Fairly important for some minor part of my job. 3 - Moderately important for a relatively major part of my job. 4 - Very important for a significant part of my job. 5 - Critically important to job performance.</p>	<p>0 – Not needed at time of licensure; this knowledge may be acquired during job training post-licensure. 1 – Needed at time of licensure; this job knowledge is important to perform the job duties of a CSR.</p>

KNOWLEDGE	IMPORTANCE	WHEN NEEDED
------------------	-------------------	--------------------

I. REPORT PROCEEDINGS

1.	Knowledge of relevant Code of Civil Procedure regarding administering the oath to witnesses and interpreters.	0 1 2 3 4 5	0 1
2.	Knowledge of the information provided in the court calendar.	0 1 2 3 4 5	0 1
3.	Knowledge of information required to identify parties for the record.	0 1 2 3 4 5	0 1
4.	Knowledge of participants' rights in the deposition proceeding according to the Code of Civil Procedure.	0 1 2 3 4 5	0 1
5.	Knowledge of reporter's duties in court or deposition proceedings according to the Codes.	0 1 2 3 4 5	0 1
6.	Knowledge of the capabilities of the Computer-Aided Transcription (CAT) software.	0 1 2 3 4 5	0 1
7.	Knowledge of the operation and maintenance of the stenographic machine to facilitate verbatim reporting.	0 1 2 3 4 5	0 1
8.	Knowledge of the procedures regarding marking and handling of exhibits to ensure identification and safekeeping.	0 1 2 3 4 5	0 1
9.	Skill to read stenographic notes aloud when requested.	0 1 2 3 4 5	0 1
10.	Skill to recognize testimony that has been objected to and sustained and/or stricken in order to preclude reading it back.	0 1 2 3 4 5	0 1
11.	Skill to stenographically identify multiple speakers to accurately attribute statements.	0 1 2 3 4 5	0 1
12.	Knowledge of daily transcript requirements in death penalty cases.	0 1 2 3 4 5	0 1
13.	Knowledge of use of Back-up Audio Media (BAM).	0 1 2 3 4 5	0 1
14.	Knowledge that the stenographic notes are the official record.	0 1 2 3 4 5	0 1
15.	Knowledge of Codes pertaining to when to go on and off record in deposition.	0 1 2 3 4 5	0 1
16.	Knowledge of protocols and procedures for reporting proceedings conducted through an interpreter.	0 1 2 3 4 5	0 1

IMPORTANCE	WHEN NEEDED
<p>HOW IMPORTANT is performance of this task in your current job?</p> <p>0 - Does not apply to my job; not required for job performance. 1 - Of minor importance or incidental performance. 2 - Fairly important for some minor part of my job. 3 - Moderately important for a relatively major part of my job. 4 - Very important for a significant part of my job. 5 - Critically important to job performance.</p>	<p>0 – Not needed at time of licensure; this knowledge may be acquired during job training post-licensure. 1 – Needed at time of licensure; this job knowledge is important to perform the job duties of a CSR.</p>

KNOWLEDGE		IMPORTANCE	WHEN NEEDED
17.	Skill to operate the stenographic machine at the speed required by Code.	0 1 2 3 4 5	0 1
18.	Skill to assert control during proceeding to ensure accuracy of the record.	0 1 2 3 4 5	0 1

II. TRANSCRIPTION

19.	Knowledge of the use of caption information in transcript preparation.	0 1 2 3 4 5	0 1
20.	Knowledge of basic computer operating functions and capabilities.	0 1 2 3 4 5	0 1
21.	Knowledge of Computer-Aided Transcription (CAT) requirements in death penalty cases.	0 1 2 3 4 5	0 1
22.	Knowledge of transcript format guidelines according to Minimum Transcript Format Standards.	0 1 2 3 4 5	0 1
23.	Knowledge of the capabilities and application of court reporting software to produce transcript of proceedings.	0 1 2 3 4 5	0 1
24.	Knowledge of certificate page requirements.	0 1 2 3 4 5	0 1
25.	Knowledge of Codes pertaining to formatting and producing transcripts of confidential proceedings.	0 1 2 3 4 5	0 1
26.	Knowledge of the conditions that require redaction in the transcript.	0 1 2 3 4 5	0 1
27.	Knowledge of the production of indices in a record on appeal.	0 1 2 3 4 5	0 1

III. PROOFREADING

28.	Knowledge of English language vocabulary.	0 1 2 3 4 5	0 1
29.	Knowledge of legal terminology and spelling.	0 1 2 3 4 5	0 1
30.	Knowledge of medical terminology and spelling.	0 1 2 3 4 5	0 1
31.	Knowledge of English grammar and rules of punctuation.	0 1 2 3 4 5	0 1
32.	Knowledge of research methods to verify citations, spelling of medical, legal, and technical terminology, and correct word and punctuation usage.	0 1 2 3 4 5	0 1
33.	Knowledge to recognize and correct homonym-type errors.	0 1 2 3 4 5	0 1

IMPORTANCE	WHEN NEEDED
<p>HOW IMPORTANT is performance of this task in your current job?</p> <p>0 - Does not apply to my job; not required for job performance. 1 - Of minor importance or incidental performance. 2 - Fairly important for some minor part of my job. 3 - Moderately important for a relatively major part of my job. 4 - Very important for a significant part of my job. 5 - Critically important to job performance.</p>	<p>0 – Not needed at time of licensure; this knowledge may be acquired during job training post-licensure. 1 – Needed at time of licensure; this job knowledge is important to perform the job duties of a CSR.</p>

KNOWLEDGE	IMPORTANCE	WHEN NEEDED
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IV. TRANSCRIPT MANAGEMENT

34.	Knowledge of methods and media to back up data.	0 1 2 3 4 5	0 1
35.	Knowledge of the practices to copy and attach exhibits to original and certified copies of transcripts.	0 1 2 3 4 5	0 1
36.	Knowledge of the manner in which to make the required formatting distinctions between rough drafts and certified copies.	0 1 2 3 4 5	0 1
37.	Knowledge of the methods to deliver rough draft transcripts.	0 1 2 3 4 5	0 1
38.	Knowledge of the basic operating functions of Computer-Aided Transcription (CAT) software to electronically send rough drafts to users including clients, proofreader, and court personnel.	0 1 2 3 4 5	0 1
39.	Knowledge of court reporting software to facilitate producing an electronic file.	0 1 2 3 4 5	0 1
40.	Knowledge of Code of Civil Procedure as it pertains to the witness's reading and signing the transcript.	0 1 2 3 4 5	0 1
41.	Knowledge of time limits required to produce and deliver finished transcripts.	0 1 2 3 4 5	0 1
42.	Knowledge of the procedures regarding witness review of the original deposition transcript.	0 1 2 3 4 5	0 1
43.	Knowledge of the laws regarding the sale of products and services.	0 1 2 3 4 5	0 1
44.	Knowledge of the requirements pertaining to the filing of sealed court transcripts.	0 1 2 3 4 5	0 1
45.	Knowledge of the maintenance and disposition of stenographic notes.	0 1 2 3 4 5	0 1

V. ETHICS

46.	Knowledge of the Code provisions concerning confidentiality of proceedings.	0 1 2 3 4 5	0 1
47.	Knowledge of notification procedures when any part of a transcript is requested by a party to the proceeding.	0 1 2 3 4 5	0 1
48.	Knowledge of the requirements to act impartially toward all parties to a proceeding.	0 1 2 3 4 5	0 1
49.	Knowledge of the Professional Standards of Practice.	0 1 2 3 4 5	0 1
50.	Knowledge of Codes pertaining to disclosure of conflicts of interest.	0 1 2 3 4 5	0 1

YOU HAVE COMPLETED THE SURVEY QUESTIONNAIRE.

PLEASE RETURN THE QUESTIONNAIRE IN THE ENVELOPE
PROVIDED BY May 15, 2009.

THANK YOU FOR PARTICIPATING IN THIS IMPORTANT PROJECT.

APPENDIX C – RESPONDENTS BY REGION

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1 – LOS ANGELES AND VICINITY

Los Angeles	144
Orange	50

TOTAL LOS ANGELES: 194

2 – SAN FRANCISCO BAY AREA

Alameda	15
Contra Costa	15
Marin	2
Napa	4
San Francisco	25
San Mateo	8
Santa Clara	18
Solano	10

TOTAL BAY AREA: 97

3 – SAN JOAQUIN VALLEY

Fresno	12
Kern	11
Madera	3
Merced	5
San Joaquin	9
Stanislaus	9
Tulare	4

TOTAL SAN JOAQUIN: 53

4 – SACRAMENTO VALLEY

Butte	5
Glenn	1
Sacramento	35
Sutter	5
Yolo	1

TOTAL SACRAMENTO: 47

5 – SAN DIEGO AND VICINITY

Imperial	1
San Diego	47

TOTAL SAN DIEGO: 48

6 – SHASTA/CASCADE

Lake	2
Plumas	1
Shasta	12
Siskiyou	1
Tehama	3
Trinity	4

**TOTAL
SHASTA/CASCADE: 23**

7 – RIVERSIDE AND VICINITY

Riverside	27
San Bernardino	20

TOTAL RIVERSIDE: 47

8 - SIERRA MOUNTAIN VALLEY

Amador	2
Calaveras	1
El Dorado	2
Nevada	2
Placer	5
Tuolumne	2

**TOTAL
SIERRA MOUNTAIN: 14**

9 - NORTH/CENTRAL COAST

Del Norte	1
Mendocino	2
Santa Cruz	5
Sonoma	4

TOTAL NORTH COAST: 12

10 – SOUTH COAST

Monterey	3
San Benito	1
San Luis Obispo	1
Santa Barbara	5
Ventura	12

TOTAL SOUTH COAST: 22

11 – MISSING

TOTAL MISSING: 1

TOTAL RESPONDENTS: 558

APPENDIX D – SCALE MEANS AND CRITICAL INDICES FOR ALL
TASKS

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I. Reporting Proceedings

ITEM	JOB TASK	MEAN TASK		MEAN CRITICAL TASK INDEX
		FREQ (F)	IMP (I)	
8.	Utilize stenographic equipment with the fluency and speed required to capture verbatim testimony in a manner that allows for accurate transcription.	4.97	4.97	24.72
9.	Utilize speaker identification to attribute statements made on the record.	4.97	4.95	24.66
2.	Obtain the case caption for transcript preparation.	4.64	4.69	22.61
3.	Obtain all parties' names and contact information to facilitate transcript production and distribution.	4.60	4.69	22.34
7.	Identify in the record when exhibits are marked and/or received to produce the exhibit index.	4.47	4.63	21.53
11.	Control the proceedings to ensure a verbatim record.	4.05	4.75	19.58
12.	Read back proceedings to review the record as requested.	3.71	4.63	17.65
4.	Administer the oath to witnesses/interpreters according to the relevant Code.	2.87	3.04	14.16
6.	Mark and retain exhibits introduced during the proceedings for indexing and inclusion in the record.	2.64	2.97	12.96
10.	Utilize realtime translation to accommodate requests of clients.	2.88	3.23	12.68
1.	Collect the daily calendar to identify the parties in the action and case numbers.	2.61	2.70	12.18
5.		.81	1.73	3.06

II. Transcribing Proceedings

ITEM	JOB TASK	MEAN TASK		MEAN CRITICAL TASK INDEX
		FREQ (F)	IMP (I)	
16.	Punctuate transcript to accurately reflect the proceedings.	4.92	4.88	24.09
14.	Create title, appearance, index, and certificate pages to conform to Codes.	4.81	4.85	23.69
15.	Maintain a current stenographic dictionary to facilitate transcript production.	4.81	4.79	23.21
18.	Ensure transcript meets Minimum Transcript Format Standards to comply with regulations.	4.74	4.78	23.01
13.	Translate stenographic notes to prepare the transcript.	4.64	4.82	22.96
17.	Maintain confidentiality in accordance with the prevailing Codes to help maintain all parties' rights.	4.32	4.77	21.23
19.	Create and deliver an electronic file of the transcript when requested or required by the Code.	3.35	3.90	15.07

III. Research and Language Skills

ITEM	JOB TASK	MEAN TASK		MEAN CRITICAL TASK INDEX
		FREQ (F)	IMP (I)	
22.	Check spelling on transcripts to ensure documents are free of typographical and/or homonym-type errors.	4.90	4.90	24.09
21.	Proofread the transcript for correct punctuation and to ensure all testimony given has been captured.	4.85	4.91	23.98
24.	Research the use and spelling of medical and legal terminology and verify spelling of technical terms used during testimony.	4.43	4.79	21.44
23.	Research obscure or unknown terms mentioned during testimony to ensure accuracy.	4.40	4.74	21.16
20.	Find citations stated on the record to ensure spelling is correct.	3.36	4.26	15.69

IV. Transcript Management

ITEM	JOB TASK	MEAN TASK		MEAN CRITICAL TASK INDEX
		FREQ (F)	IMP (I)	
27.	Retain stenographic notes and records of proceedings in a secure manner that ensures future accessibility.	4.85	4.81	23.65
26.	Prepare and deliver transcripts in accordance with the Code.	4.61	4.73	22.77
28.	Bill products and services in accordance with applicable statutes.	3.21	3.65	15.34
25.	Fulfill requests for rough draft transcripts pursuant to Code or other relevant requirements.	2.70	3.50	11.69

V. Ethics

ITEM	JOB TASK	MEAN TASK		MEAN CRITICAL TASK INDEX
		FREQ (F)	IMP (I)	
29.	Adhere to the statutes outlined in the Business & Professions Code as they pertain to performing tasks required of Certified Shorthand Reporters.	4.81	4.87	23.64
31.	Maintain impartiality and confidentiality in accordance with applicable Codes.	4.73	4.84	23.21
30.	Practice and apply state and local Rules of Court and applicable statutes.	4.04	4.28	19.85
32.	Utilize Back-up Audio Media (BAM) in accordance with applicable standards.	3.70	3.54	16.17

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APPENDIX E – SCALE MEANS AND CRITICAL INDICES FOR ALL
KNOWLEDGE STATEMENTS

I. Reporting Proceedings

ITEM	KNOWLEDGE STATEMENT	Importance (I)
17.	Skill to operate the stenographic machine at the speed required by Code.	4.94
11.	Skill to stenographically identify multiple speakers to accurately attribute statements.	4.90
3.	Knowledge of information required to identify parties for the record.	4.66
9.	Skill to read stenographic notes aloud when requested.	4.66
18.	Skill to assert control during proceeding to ensure accuracy of the record.	4.61
7.	Knowledge of the operation and maintenance of the stenographic machine to facilitate verbatim reporting.	4.58
14.	Knowledge that the stenographic notes are the official record.	4.49
6.	Knowledge of the capabilities of the Computer-Aided Transcription (CAT) software.	4.45
5.	Knowledge of reporter's duties in court or deposition proceedings according to the Codes.	4.39
16.	Knowledge of protocols and procedures for reporting proceedings conducted through an interpreter.	4.07
10.	Skill to recognize testimony that has been objected to and sustained and/or stricken in order to preclude reading it back.	3.27
15.	Knowledge of Codes pertaining to when to go on and off record in deposition.	3.21
8.	Knowledge of the procedures regarding marking and handling of exhibits to ensure identification and safekeeping.	3.18
13.	Knowledge of use of Back-up Audio Media (BAM).	2.99
1.	Knowledge of relevant Code of Civil Procedure regarding administering the oath to witnesses and interpreters.	2.71
4.	Knowledge of participants' rights in the deposition proceeding according to the Code of Civil Procedure.	2.20
2.	Knowledge of the information provided in the court calendar.	2.03
12.	Knowledge of daily transcript requirements in death penalty cases.	1.93

II. Transcribing Proceedings

ITEM	KNOWLEDGE STATEMENT	Importance (I)
20.	Knowledge of basic computer operating functions and capabilities.	4.56
23.	Knowledge of the capabilities and application of court reporting software to produce transcript of proceedings.	4.55
22.	Knowledge of transcript format guidelines according to Minimum Transcript Format Standards.	4.38
24.	Knowledge of certificate page requirements.	4.28
19.	Knowledge of the use of caption information in transcript preparation.	4.02
25.	Knowledge of Codes pertaining to formatting and producing transcripts of confidential proceedings.	3.86
26.	Knowledge of the conditions that require redaction in the transcript.	3.08
27.	Knowledge of the production of indices in a record on appeal.	2.48
21.		1.85

III. Research and Language Skills

ITEM	KNOWLEDGE STATEMENT	Importance (I)
28.	Knowledge of English language vocabulary.	4.85
31.	Knowledge of English grammar and rules of punctuation.	4.85
33.	Knowledge to recognize and correct homonym-type errors.	4.75
29.	Knowledge of legal terminology and spelling.	4.69
32.	Knowledge of research methods to verify citations, spelling of medical, legal, and technical terminology, and correct word and punctuation usage.	4.60
30.	Knowledge of medical terminology and spelling.	4.57

IV. Transcript Management

ITEM	KNOWLEDGE STATEMENT	Importance (I)
41.	Knowledge of time limits required to produce and deliver finished transcripts.	4.43
34.	Knowledge of methods and media to back up data.	4.32
45.	Knowledge of the maintenance and disposition of stenographic notes.	4.20
39.	Knowledge of court reporting software to facilitate producing an electronic file.	3.99
38.	Knowledge of the basic operating functions of Computer-Aided Transcription (CAT) software to electronically send rough drafts to users including clients, proofreader, and court personnel.	3.52
36.	Knowledge of the manner in which to make the required formatting distinctions between rough drafts and certified copies.	3.22
37.	Knowledge of the methods to deliver rough draft transcripts.	3.05
44.	Knowledge of the requirements pertaining to the filing of sealed court transcripts.	2.79
35.	Knowledge of the practices to copy and attach exhibits to original and certified copies of transcripts.	2.61
40.	Knowledge of Code of Civil Procedure as it pertains to the witness's reading and signing the transcript.	2.60
42.	Knowledge of the procedures regarding witness review of the original deposition transcript.	2.49
43.	Knowledge of the laws regarding the sale of products and services.	2.41

V. Ethics

ITEM	KNOWLEDGE STATEMENT	Importance (I)
48.	Knowledge of the requirements to act impartially toward all parties to a proceeding.	4.65
49.	Knowledge of the Professional Standards of Practice.	4.25
46.	Knowledge of the Code provisions concerning confidentiality of proceedings.	4.11
50.	Knowledge of Codes pertaining to disclosure of conflicts of interest.	3.74
47.	Knowledge of notification procedures when any part of a transcript is requested by a party to the proceeding.	3.66