

RECORDS MANAGEMENT COORDINATOR

DEFINITION

Under general supervision, coordinates a comprehensive records management program; provides responsible technical oversight in the maintenance of electronic and physical records; implements records management systems, policies, and procedures to ensure effective destruction, retention, and permanent storage of records; provides general administrative and technical support to the District Secretary; and performs other duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the District Secretary. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

This classification is responsible for independently performing technical and administrative support duties in support of the District's records retention and management program. Positions at this level exercise judgment and initiative in their assigned tasks, receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the typical functions of the job.

- Coordinates a centralized records management program, including recommending appropriate retention periods in accordance with legal and regulatory requirements and business needs; maintains and updates the records retention schedule; reviews records for compliance with retention schedules and for adherence to procedures and standards.
- Maintains accurate and up-to-date files and records for assigned areas including maintaining electronic records management systems; monitors various logs, accounts, and files for current and accurate information; develops, organizes, and maintains filing systems.
- Receives, logs, and tracks public information requests; reviews requests and consults with District and legal staff on determining responsive documents; compiles materials and submits to requestors.
- Assists in the preparation of reports; collects and assembles data and background materials; compiles, prepares, and enters data into a computer from various sources; verifies data for accuracy and completeness; inputs corrections and updates.
- Assists and guides District staff with indexing and maintenance of records pursuant to the established records retention schedule; provides information on records management policies and procedures; responds to questions and requests for information relating to District records practices.
- Conducts records management and electronic document management system training for District staff; develops training content and facilitates training sessions.

- Organizes and maintains archived physical records; retrieves records as necessary and ensures proper destruction of records in accordance with legal retention schedule and destruction guidelines and in accordance with policies and procedures.
- Reorganizes physical and electronic documents and records; images, indexes, and archives District records; assists in organizing and logging records for destruction.
- Attends Board- related meetings and assists with agenda posting requirements as needed.
- Performs a variety of general office support functions; maintains calendar of activities, meetings, and various events for assigned staff; orders, organizes and stocks office supplies for the department as needed; receives, processes, and distributes mail; prepares purchase requisitions; processes and checks requests.
- Develops and revises office forms and reports and provides administrative support as needed.
- In conjunction with information technology staff and/or vendor consultants, assists in the implementation of records management software, workflow, and forms, as needed.
- Oversees quality control of records boxed and intended for physical archiving.
- May assist in coordinating, developing, and monitoring the assigned budget; recommends expenditure requests for designated accounts; monitors approved budget accounts.
- Complies with District safety policies and procedures.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Applicable federal, state, and local laws, codes, and ordinances relevant to the area(s) of responsibility.
- Methods and techniques of records management including indexing, filing, preservation, storage, and destruction.
- Basic principles and techniques of training.
- Current technology for records maintenance, storage, and preservation, including imaging and digital preservation practices.
- Computerized information systems as they apply to records management and record keeping.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Coordinate and oversee a comprehensive records management program.
- Understand, interpret, and apply general and specific administrative and office policies and procedures as well as pertinent laws and regulations.
- File and retrieve a wide variety of materials within electronic and physical records storage.
- Independently prepare a variety of correspondence, memoranda, and reports.
- Promote adherence to the District's records retention schedule.
- Type and enter data at a speed necessary for successful job performance.

- Independently organize work, set priorities, meet critical deadlines and follow-up on assignments.
- Use tact, initiative, prudence and independent judgment within general policy and procedural guidelines.
- Effectively use computer systems, software applications relevant to work performed and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education:

Equivalent to completion of the twelfth (12th) grade supplemented by specialized training or coursework in office administration, records management, or related field.

Experience:

- Three (3) years of journey-level clerical or administrative support experience, including one (1) year of experience maintaining a comprehensive records management system.

Licenses and Certifications:

- Possession of a valid California Class C driver's license, to be maintained throughout employment.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

ENVIRONMENT

Standard office setting; frequent interaction with staff and the general public. Occasionally, must work in storage areas with exposure to dust and stale air.

PHYSICAL

• Level Two

Incumbents require specific vision abilities and sufficient mobility to work in an office setting; stand or sit for prolonged periods of time; operate office equipment including use of a computer keyboard; occasionally lifting and carrying up to 50 pounds; ability to verbally communicate to exchange information.

VISION

See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents; and to operate assigned equipment.

HEARING

Hear in the normal audio range with or without correction.