

RECORDS MANAGER

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

To perform a variety of complex duties in the process of planning, organizing and managing the city-wide records management and document imaging programs; to train department staff and other departments in the use of imaging software and equipment; to direct and supervise records and imaging activities of City Clerk's staff; to direct the daily operations of the City's off-site records storage facilities; and to provide varied, complex and often confidential administrative assistance to the City Clerk, and the Assistant City Clerk.

EXAMPLES OF DUTIES – *Examples of duties performed by employees in this class may not include all required duties, nor are all listed tasks necessarily performed by everyone in this class.*

Manages the Citywide document-imaging program; trains staff from all departments in software use, retrieval procedures, and records management procedures and policies; coordinates the organization, staffing, and operational activities for the City's off-site Record Storage and Imaging Center; oversees and participates in activities related to the security, preservation, and conservation of inactive records and documents; designs, creates, and implements document management databases and applications; manages various database tables, forms, and queries for the City Clerk's Office; supervises the receipt and processing of City documents, files, and materials transferred to the Records Center and Archives; supervises the checkout and return of documents to City departments and outside agencies; oversees and participates in providing delivery services for material requested from and returned to the Record Center; oversees the acquisition and preservation of material into the archival collections; supervises the shredding and recycling of material authorized by department retention schedules and City Council action for disposal; provides scanning of photographs/documents and electronic editing services for the City Clerk's Office and for delivery of requested records electronically; identifies opportunities for improving service delivery methods and procedures; identifies resource needs; reviews with appropriate management staff; implements improvements; assists with the development of imaging facilities for the conversion of documents to microfilm and digital format; oversees the imaging program and maintains the microform collection; coordinates with vendors for the conversion of documents to microfilm; directs, coordinates, and reviews the work plan for assigned services and activities; assigns work activities and projects; monitors work flow; reviews and evaluates work products, methods, and procedures; meets with staff to identify and resolve problems; selects, trains, motivates, and evaluates assigned personnel; provides or coordinates staff training; works with employees to correct deficiencies; provides training to City departments related to maintaining, preserving, and transferring records into short or long term storage; provides research assistance to City staff, citizens and researchers including research for freedom of information requests, public records requests, litigation, and historical research; participates in the development and administration of assigned program budget; forecasts funds needed for staffing, equipment, materials, and supplies; monitors and verifies expenditures; recommends adjustments as necessary; provides staff assistance to the

Assistant City Clerk; performs the Oath of Office in the absence of the City Clerk and the Assistant City Clerk; signs official City documents in the absence of the City Clerk and the Assistant City Clerk; participates on a variety of committees; prepares and presents staff reports and other correspondence as appropriate and necessary; attends and participates in professional group meetings; stay abreast of new trends and innovations in the field of records management; assists with election requirements and preparation and distribution of handbooks for advisory groups and political candidates; performs related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

- Principles and practices of supervision, training and performance evaluation.
- Document imaging software.
- Operational characteristics, services, and activities of a modern records management program.
- Modern and complex principles and practices of records and information management.
- Computer network and operating systems as well as applicable software applications used in records management including database software programs used for inventory management and access to record holdings.
- Principles and practices of file indexing and filing systems.
- Principles and techniques used in electronic imaging systems and photographic imaging systems.
- Methods, techniques, and principles used in the preservation and maintenance of various materials including paper, film, and electronic media.
- Principles of municipal budget preparation and control.
- Modern office procedures, methods, and equipment including computers.
- Procedures used in implementing legal guidelines, regulations, laws, and procedures governing the confidentiality, security, and administration of municipal records.
- Pertinent Federal, State, and local laws, codes, and regulations governing the utilization, preservation, and disposition of City records.
- Principles of business letter writing and basic report preparation.

Ability to:

- Select, supervise, train, evaluate and coordinate the work of staff.
- Use computer software programs and hardware and other technology pertinent to area of specialization.
- Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
- Interpret, explain, and apply administrative and departmental policies and procedures including those related to records management.
- Locate information and data required by the City and develop procedures to organize, evaluate, and develop reports for the information.
- Prepare clear and concise reports.
- Operate forklifts and other motorized equipment.
- Effectively organize and prioritize work to meet established deadlines.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective relationships with those contacted in the course of work.

Experience and Training

Experience: Four years of records management/archives experience including experience in inventorying records and managing off-site records storage facilities.

Training: Equivalent to a Bachelor's degree from an accredited college or university with major course work in history, business administration, public administration, or a related field.

License or Certificate:

- An appropriate, valid, California driver's license.
- Possession of, or ability to obtain, an appropriate, valid forklift operator's license.
- Certified Records Manager (CRM) or Certified Document Imaging Architect (CDIA) certification is highly desirable.

SPECIAL REQUIREMENTS

Pass a background investigation including a polygraph, psychological exam, and a medical exam, which will include drug testing.

WORKING CONDITIONS

Environmental Conditions: Office and warehouse environment; exposure to computer screens; exposure to dust.

Physical Conditions: Essential functions may require maintaining physical condition necessary for properly lifting boxes of records weighing up to 50 lbs and handling these boxes on ladders at heights of 10 to 12 feet; operating various motorized equipment; sitting and standing for prolonged periods of time; repeated bending; speaking and hearing to exchange information.