



## Records Management Specialist

### ***Purpose of the role:***

Under general supervision, performs a wide variety of specialized duties in the administration and implementation of the Citywide Records Management Program in accordance with legal requirements and records management policies and procedures. This position maintains, updates, and enforces Citywide records retention schedules, policies, and procedures for records management, microfilming, and vital records protection and preservation, reference retrieval and disposal activities; acts as liaison between user departments and the Records Management Division, including training other departmental staff on records management; and performs related duties as assigned.

### ***Distinguishing Characteristics:***

This is the journey level class within the Records Management Specialist series. Positions at this level perform skilled and specialized records management functions requiring an extensive knowledge of the laws, codes, regulations, policies and procedures related to the retention, retrieval and distribution of public records and are distinguished from the Administrative Clerk II class by the level of responsibility assumed and the complexity of duties assigned. Incumbents in the former class primarily perform specialized clerical functions related to the maintenance and safeguarding of official City records.

***The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.***

### ***Essential Duties and Responsibilities:***

- Performs a full range of responsible, specialized, technical, and confidential office administrative and advanced clerical support functions of a specialized nature in support of the City Clerk's Department.
- Assists the Records Management Supervisor in organizing and administering the Citywide Records Management Program; completes special projects as assigned; serves as a liaison between the City Clerk's Department, City staff and the general public.
- Performs a full range of responsible, specialized, technical, and confidential office administrative and advanced clerical support functions of a specialized nature in support of the City Clerk's Department.
- Manages Citywide off-site records storage systems, including records filing and retrieval, and assisting with internal and offsite audits for legal retention requirements.

- Working with the Records Management Supervisor, performs administrative functions related to imaging system software including assisting with installations, adding new users, assigning rights to folders, and password modifications; meets with City staff to define retrieval needs and parameters; assists and trains users in the imaging system; prepares documents for scanning, index documents, and OCR permanent departmental documents.
- May act as the Administrator in Laserfiche, and assist with assigning passwords to City staff.
- Prepares documents for imaging and permanent storage, purges and boxes files for transfer or destruction; assists with the administration of the citywide destruction of records in accordance with the records retention schedule including the preparation of Resolutions of Destruction; works with all departments in the purging of files and coordination of the timely destruction of records; assists with the annual citywide records purge.
- Performs administrative functions related to imaging system software including installing, adding new users, assigning rights to folders, and password modifications; meets with City staff to define retrieval needs and parameters; assists and trains users in the imaging system; prepares documents for scanning, index documents, and OCR permanent departmental documents.
- Researches records requests from staff and public; orders and retrieves boxes containing files from storage; reviews case files with outside customers.
- Assists in implementing records and information management policies and procedures; assists users in the development of automated records management applications.
- May act in the absence of Records Management Supervisor.
- Performs related duties as required.

*The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.*

***Desired  
Minimum  
Qualifications:***

Knowledge of:

- Operations, services, and activities of a records management program.
- Records management principles, practices, methods, and techniques.
- Pertinent federal, state, and local laws, codes, and regulations including those relating to retention requirements for a wide variety of documents.
- General functions of a municipal government and their associated record keeping requirements.
- Procedures and legal requirements necessary to maintain, archive, preserve, and protect municipal records.
- Principles, practices, and procedures of automated and manual records management, retrieval, and storage including micrographics, electronic imaging, automated information retrieval systems, and computer systems related to maintaining municipal records.

- Technology applications relevant to records management.
- Principles and practices used in the development of records retention schedules.
- Principles of basic business letter writing and report preparation.
- Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.

Ability to:

- Learn the organization, operation, and services of the City and of outside agencies as necessary to assume assigned responsibilities.
- Learn to correctly interpret and apply general administrative and departmental policies and procedures.
- Learn to apply applicable federal, state, and local laws, codes, and regulations.
- Operate office equipment including computers and supporting word processing, spreadsheet, database applications, and specialized programs related to records management.
- Learn and effectively utilize various software applications.
- Learn and apply new information and skills.
- Type or enter data at a speed necessary for successful job performance.
- Establish and maintain a variety of files and records.
- Prepare routine correspondence and memoranda.
- Accurately count, record, and balance assigned transactions.
- Perform routine mathematical calculations.
- Respond tactfully, clearly, concisely, and appropriately to inquiries from other City staff, the general public, and outside agencies.
- Work under steady pressure with frequent interruptions and a high degree of public contact by phone and in person.
- Plan and organize work to meet changing priorities and deadlines.
- Understand and carry out oral and written directions.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Respond and perform assigned duties in the event of a City-declared emergency.

**Competencies:**

- Strategic Thinker
- Results Oriented
- Customer-Focused
- Flexible/Adaptable
- Accountable
- Planner and Organizer
- Technically Knowledgeable

Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

**Education:**

Equivalent to completion of the twelfth grade.

**Education and  
Experience  
Guidelines:**

**Experience:**

Two years of responsible clerical or office administrative experience at a level comparable to an Administrative Clerk II with the City of Thousand Oaks. Experience in a municipal government setting and supplemental specialized records management experience are desirable.

**Licenses; Certificates; Special Requirements:**

A valid Class C California driver's license is required.

*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.*

**Physical and  
Environmental  
Conditions:**

**Physical:** Sufficient physical ability to work in an office setting; sit, stand, walk, reach, twist, turn, kneel, bend, squat, and/or stoop for prolonged periods of time; perform duties requiring grasping, repetitive hand movement, and fine coordination; lift, drag, and push/pull files, paper, storage containers, and documents weighing up to 25 pounds; and operate office equipment. **Vision:** See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate office equipment. **Hearing:** Hear in the normal audio range with or without correction.

**Environment:** Standard office setting.

*Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not include all** duties performed by individuals within a classification. In addition, specifications are intended to outline the **minimum** qualifications necessary for entry into the class and do not necessarily convey the final qualifications of incumbents within the position.*

*Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisor or by law.*

Date Adopted: 7/1/07

Date Revised: