



## Senior Records Management Specialist

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

Under direction, oversees, and participates in the more complex and difficult work in the administration and implementation of the Citywide Records Management Program; performs a wide variety of difficult and specialized duties related to the maintenance of City-wide records, including 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 advanced journey level class within the Records Management Specialist series. Positions at this level are distinguished from the Records Management Specialist class by its complexity and full range of responsibilities. Employees at this level only receive occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Incumbents frequently perform duties of a complex, sensitive, and confidential nature which includes providing highly skilled and specialized records management administration requiring an extensive knowledge of the laws, codes, regulations, policies and procedures related to the retention, retrieval and distribution of public records. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility, exercise considerable independent judgment and problem-solving skills, act in the absence of the Records Management Supervisor including lead functions over lower level staff, and serve as a liaison between the City Clerk's Department, City staff and the general public; and perform related duties as assigned.

***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 with the administration, organizing, and implementation of the Citywide Records Management Program in accordance with legal requirements and records management policies and procedures; completes special projects as assigned; represents the Records Management Supervisor at various meetings and events; serves as a liaison between the City Clerk's Department, City staff and the general public.

- Manages Citywide off-site records storage systems, including records filing and retrieval, and assisting with internal and offsite audits for legal retention requirements.
- 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; coordinates and manages 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.
- Coordinates and participates in projects to image City records.
- Acts as the Administrator in Laserfiche and assigns passwords to City staff.
- Assists with content, information/document input, quality control, and hardware/software maintenance.
- Updates file categories; develops and revises cross-reference index including determining appropriate legal retention periods and determining the appropriate office of record; updates records management program procedures manuals for use by all City departments.
- Conducts transactions with customers and the public and solving routine to non-routine problems based on knowledge gained through experience.
- Conducts research and prepares reports and other necessary correspondence, as needed; 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.
- Acts 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.
- Procedures, techniques, and methods of document and digital file preservation.
- 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:

- Implement goals, objectives, policies, and procedures for providing citywide records management functions.
- 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.

**Experience:**

**Education and  
Experience  
Guidelines:**

Four years of increasingly responsible records management, clerical, or office administrative experience at a level comparable to a Records Management Specialist with the City of Thousand Oaks.

**Licenses; Certificates; Special Requirements:**

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

Certification as a Certified Records Manager (CRM) is desirable.

*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: