



**JULY 2012**  
**FLSA: EXEMPT**

## **RECORDS MANAGEMENT SPECIALIST**

*This class specification indicates, in general terms, the type and level of work performed as well as the responsibilities of employees in this classification. The job functions described are not to be interpreted as being all-inclusive to any specific employee.*

### **DEFINITION**

Under general direction, performs a variety of analytical and administrative duties involved in the development, implementation, and administration of the District's records management program; receives, distributes, and coordinates responses for all requests for public records; ensures compliance with California Public Records Act regulations and timelines; conducts research, compiles and analyzes data, and makes appropriate recommendations based on analysis; prepares various reports to improve the efficiency and effectiveness of operations; performs a variety of responsible professional tasks relative to assigned area of responsibility; and performs related work as required.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from assigned supervisory and/or management staff. Exercises no direct supervision of staff. May coach and/or mentor less experienced staff.

### **CLASS CHARACTERISTICS**

This is a single-position professional classification that is responsible for the coordination and maintenance of the District's records management program. Responsibilities include developing, implementing, and maintaining policies and procedures of the records management system, providing relevant information to the public, and working independently and exercising a high degree of independent judgment, tact, and initiative. Positions at this level 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. Responsibilities may include guidance on programs and/or projects and leads by example. This class is distinguished from administrative support classes by the performance of complex technical and specialized duties requiring the application of a larger base of technical knowledge and skill.

### **EXAMPLES OF ESSENTIAL 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 essential functions of the job.*

- Responds to inquiries regarding public records, the Public Records Act, and the Freedom of Information Act; reviews and monitors legal requests for records; justifies any nondisclosure and/or ensures deletion of any portions that are exempt from the mandate of the Public Records Act; provides assistance to the public by helping to identify records and information relevant to the request; ensures timely response to all requests and communicates in writing with any requester in cases of unusual requests that may cause delays in obtaining all requested information.
- Performs a variety of professional level duties involved in the development, implementation, and administration of the District's records management program; coordinates with all District

departments and divisions to identify, classify, manage, and control their records and information needs.

- Participates in the development and implementation of records management goals, objectives, and priorities for the District; researches, implements, and administers policies, procedures, and changing business practices and processes for assigned area.
- Develops, implements, and provides departmental and organization-wide training sessions on records management related topics and e-mail/internet and related policies.
- Consults with and advises department personnel on records management issues; responds to and resolves inquiries and complaints; interprets applications of records management policies and procedures.
- Participates on, provides staff support to, and represents records management programs and functions on committees and task forces to develop, schedule, implement, and monitor programs and projects that impact various District departments; responds to and resolves inquiries and complaints.
- Provides assistance in resolving operational and administration problems; identifies opportunities for improving service delivery methods and procedures; conducts research to find alternative solutions; makes recommendations; identifies resource needs; reviews with appropriate management staff; implements improvements; reviews and evaluates the implementation of changes.
- Coordinates the disposition of District records.
- Implements and maintains a vital records management program and disaster recovery program.
- Conducts or participates in studies of new and existing programs and special projects; researches and analyzes organization structure, technical data, and fiscal impact to determine feasibility, resolve problems, and/or increase efficiency; consults with District staff, outside agencies, and associations to obtain information; prepares administrative, operational, and financial reports including developing conclusions, recommendations, and forecasts based on data summaries and other findings.
- Assists with the budget process; provides assistance in the development of assigned budget; collects and analyzes financial data; monitors monthly status.
- Provides staff assistance to management staff; performs administrative duties including performing a variety of professional level administrative, operational, financial, and analytical duties in support of assigned programs and functions.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in the fields of records and information management.
- When assigned to programs and/or projects, provides leadership and guidance to others. As a program and/or project leaders, may direct, assign, train, monitor and review the work activities of team members; determines work priorities; oversees quality and quantity of work performed and ensures adherence to established procedures by instructing employees accordingly; is a reference to employees by possessing specialized skills; develops and implements work improvements.
- Performs related duties as required.

## **QUALIFICATIONS**

### **Knowledge of:**

- Operational characteristics, services, and activities of a modern records and information management program.
- Principles and applications of critical thinking and analysis.
- Current and developing records management automation technologies.
- 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.
- Principles and practices of file indexing and filing systems.
- Methods, techniques, and principles used in the preservation and maintenance of various materials.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.

- Procedures used in implementing legal guidelines, regulations, laws, and procedures governing the confidentiality, security, and administration of records and information.
- Organizational and management practices as applied to the analysis and evaluation of programs, policies, and operational needs.
- Modern office practices, methods, and computer equipment and applications related to the work, including word processing, database, and spreadsheet applications.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing guidance and training to less experienced staff.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.

**Ability to:**

- Perform work of a specialized nature requiring the ability to use independent judgment and personal initiative.
- Lead lower level staff on programs and projects.
- Resolve conflict through supervision in establishing workable solutions and alternative approaches.
- Inspect the work of others and maintain established quality control standards.
- Demonstrate safe work practices and procedures in the workplace.
- Train others on proper work procedures and lead by example.
- Apply critical thinking and analysis to a broad range of situations.
- Develop, implement, and administer the District's records and information management program and functions.
- Use critical thinking techniques in reaching independent decisions.
- Perform a variety of difficult analytical and administrative duties in support of the District's records and information management programs and functions.
- Understand the organization, operation, and services of the District and of outside agencies as necessary to assume assigned responsibilities.
- Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
- Interpret, apply, explain, and ensure compliance with Federal, State, and local policies, procedures, laws, rules, and regulations.
- Establish processes for developing, issuing, and revising records and information management procedures.
- Identify problems, research and analyze relevant information, develop and present recommendations and justification for solution.
- Use critical thinking techniques in determining problem resolutions.
- Develop recommendations for problematic areas and implement and monitor changes.
- Conduct or participate in various organizational, fiscal, and administrative studies and analyses including those on new and existing programs and special projects.
- Collect, evaluate, and interpret information and data from multiple sources.
- Assist with budget preparation and administration.
- Respond to requests and inquiries from other departments and the public.
- Maintain confidentiality in maintaining critical and sensitive information, records, and reports.
- Effectively represent the department and the District in meetings with governmental agencies, contractors, vendors, and various businesses, professional, regulatory, and legislative organizations.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines.
- Establish, maintain, and foster positive and harmonious working relationships with those contacted in the course of work.

**Employment Standards:**

Any combination of education and experience that provides the required knowledge, skills, and abilities may be qualifying as determined by OCSD.

1. Possession of a bachelor's degree from a college or university which is accredited by the US Department of Education, with major coursework in library science, business or public administration, computer or environmental science, or a related field; AND,
2. Five (5) years of increasingly responsible records and information management related experience.

**Licenses and Certifications:**

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.
- Possession of, or ability to obtain, a Certified Records Management (CRM) certificate.

**Disaster Service Workers:**

All Orange County Sanitation District employees are designated Disaster Service Workers through state law (California Government Code Section 3100-3109). Employment with the Orange County Sanitation District requires the affirmation of a loyalty oath to this effect. Employees are required to complete all related training as assigned, and to return to work as ordered in the event of an emergency.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 25 pounds.

**ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.