



**DECEMBER 2018
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 supervision or direction, performs a variety of 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 supervision or direction from the assigned supervisory and/or managerial staff. Exercises no direct supervision of staff. May coach and/or mentor less experienced staff.

CLASS CHARACTERISTICS

This classification is a stand-alone class and not part of a job series. It 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. 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)

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

- 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.
- Ensures established safety precautions are adhered to, corrects unsafe work conditions/practices, and/or reports unsafe work conditions/practices to assigned supervisory or managerial staff.

- 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 policies and procedures 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 in the preparation and administration of the records and information management budget; monitors expenditures.
- Coordinates the disposition of District records.
- Manages the offsite storage vendor account; determines types and timing of records audits.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in the fields of records and information management; researches emerging products and enhancements and their applicability to District needs.
- Provides leadership and guidance to others on assigned programs and/or projects. As a program and/or project leader, 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 resource to employees by possessing specialized skills; develops and implements work improvements.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices and methods of a modern records and information management program.
- Principles and applications of critical thinking and analysis.
- Current and developing records management automation technologies.
- Utilize a computer, relevant software applications including records management software and/or other equipment.
- 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.
- Modern office practices and methods.
- Computer equipment and applications related to work including Enterprise Content Management systems, word processing, database and spreadsheet applications.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing guidance and training to less experienced staff.
- Principles and practices of customer service and techniques for effectively communicating 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 and foster collaboration.
- Inspect the work of others and maintain established quality control standards.
- Train others on proper work procedures.
- Apply critical thinking and analysis to a broad range of situations and in making independent decisions.
- Develop, implement, and administer the District's records and information management program and functions.
- Perform a variety of 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.
- Develop recommendations for problematic areas and implement and monitor changes.
- 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 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.
- Adhere to safe work practices and procedures in the workplace.
- Effectively 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 effective 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. Bachelor's degree from a college or university accredited by the U.S. Department of Education, with major coursework in library, business or public administration, or a related field; AND,
2. Five (5) years of increasingly responsible records and information management related experience.

Licenses and/or Certifications:

- None.

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 climb, bend, stoop, kneel, reach, push, and pull drawers open and closed to grasp/retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 10 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.