



RECORDS CENTER MANAGER

DEFINITION

Under administrative direction, oversees the development and ongoing management of the records program in the Clerk of the Board of Supervisors office. Ensures compliance with applicable management, retention, and destruction policies and procedures; serves as a liaison to department staff and outside agencies related to the records management program; including the management and storage of legislative and County records; and in the absence of the Clerk of the Board of Supervisors, serves as acting Clerk of the Board of Supervisors.

SUPERVISION RECEIVED AND EXERCISED

Receives administrative direction from assigned management personnel. Exercises general direction and direct supervision over supervisory, professional, technical, and administrative support staff.

CLASS CHARACTERISTICS

This position has full responsibility for managing and directing document control procedures in a highly visible and politically sensitive environment where there are severe consequences for errors and omissions. It is responsible for managing and directing document and records lifecycle processes and the creation, appraisal, classification, retention, and disposition of physical and electronic records, and records-related procedures, policies, and schedules. Incumbents in this class may serve as Clerk of the Board of Supervisors during absences.

This class is distinguished from the Clerk of the Board of Supervisors in that the latter is a department head with overall responsibility for administration and operation of the office.

Example of Duties (Illustrative Only)

- Plan, develop, review, and manage the County's records management program; recommend and implement ongoing process improvements.
- Facilitate and ensure the County's compliance with and adherence to approved records management, retention, and destruction policies and procedures; conduct site visits and prepare status reports related to compliance.
- Oversee the receipt, processing, and preservation of County documents, files, and materials transferred to onsite and offsite records storage facilities; supervise the checkout, delivery, and return of documents to records storage facilities from County departments and outside agencies.
- Participate in the identification, selection, and maintenance of digital records inventory applications and centralized document imaging and management databases; oversee the conversion of hard copy documents to digital format using imaging technology; coordinate with vendors for the conversion of hard copy documents.
- Serve as a liaison and provide support, consultation, and training to departments in document imaging practices and software use, records management policies, records retrieval procedures, and short- and long-term record preservation; establish and monitor training programs related to records retention and document imaging databases.
- Supervise the destruction and/or recycling of material authorized by County retention schedules; prepare destruction reports and notify departments of records eligible for destruction; review and authorize destruction requests.
- Identify opportunities for improving service delivery methods and procedures; identify current and future resource needs.
- Assist with the research and retrieval of public records requests, including historical records; provide research

assistance to County staff, public records requests, litigation, and historical research as needed.

- Participate in the development and administration of assigned program budget; forecast funds needed for staffing, equipment, materials, and supplies; monitor and verify expenditures; recommend adjustments as necessary.
- Prepare and present staff reports and other correspondence as needed related to records management program status.
- Monitor applicable federal, state, and local rules applicable to the records management program; participate in external professional group meetings; maintain awareness of new trends and innovations in the field of records management and digital document storage.
- As needed, attends meetings of the Board and directs the recording and maintaining of the record of proceedings in the minute book, including the entry of all resolutions, decisions, as well as the vote of each member.
- Serve as temporary Clerk of the Board of Supervisors during absences.
- Perform related duties as required.

QUALIFICATIONS

Knowledge of:

- Modern and complex principles and practices of records and information management programs, policies, and procedures.
- Principles and practices of file indexing and filing systems.
- Principles, practices, and techniques used in electronic imaging systems and photographic imaging systems.
- Standard and accepted methods and techniques used in the preservation and maintenance of various materials, including paper, film, and electronic media.
- Principles of budget preparation and control.
- Computer network and operating systems, as well as applicable software applications used in records management, including database software programs used for inventory management and document imaging.
- Computer software, including word processing, database, and spreadsheet applications.
- Modern office procedures, methods, and computer equipment.
- Procedures used in implementing legal guidelines, regulations, laws, and procedures governing the confidentiality, security, and administration of municipal records.
- Pertinent local, state, and federal laws, rules, regulations, and statutes, including those governing the utilization, preservation, and disposition of County records.
- Principles of business letter writing and basic report preparation, English usage, spelling, punctuation, and grammar.

Ability to:

- On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports, and special projects; identify and interpret technical and numerical information; identify, interpret, and explain policies and procedures; recall and utilize a variety of information; work under time pressure and complete a high volume of tasks; focus on a single task for long periods of time.
- Understand, interpret, and explain complex rules and procedures.
- Interpret and apply pertinent local, state, and federal laws and regulations, including Civil Service rules.
- Prepare clear, concise, and complete meeting minutes, documentation, and other reports and correspondence.
- Maintain confidentiality of sensitive information and neutral position on controversial matters.
- Effectively organize and prioritize work to meet established deadlines.
- Research and organize materials for Board information and use.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

Education and Experience:

A combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying; however, education may not solely substitute for the required experience.

Equivalent to a bachelor's degree from an accredited four-year college or university with major course work in records management, information management, business or public administration, library science, or a related field.

AND

Two (2) years of experience in records management, including inventorying records, managing offsite records facilities, and/or managing electronic document databases.

Licenses and Certifications:

- Possession of, or ability to obtain and maintain, a valid California Driver's License by time of appointment and a satisfactory driving record.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, and to operate a motor vehicle to visit various county facilities and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. On a continuous basis, sit at a desk or in meetings for long periods of time; intermittently twist to reach equipment surrounding a desk; walk, stand, bend, stoop, squat, kneel, or twist; perform simple grasping and fine manipulation; use a telephone, write, or use a keyboard to communicate through written means or to enter/retrieve data from a computer; lift light weight and on an intermittent basis, lift moderate weight. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

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 policies and procedures.

WORKING CONDITIONS

Must be willing to attend meetings outside of regular working hours.

HISTORY

Created: August 2022