

COUNTY OF SOLANO

CLASS SPECIFICATION

RECORDS COORDINATOR

Date of Draft: June 2017

CLASS SUMMARY:

Under general supervision, plans, develops, administers and implements document support functions that affect all county departments and includes; (1) ensuring Records and Information Management Governance Policy compliance regarding document production, distribution, retention, and disposition; (2) administering work streams for the County's Records and Information Management (RIM) Program; (3) overseeing County records/electronic documents and scanning functions associated with a digital mail room.

DISTINGUISHING CHARACTERISTICS:

This class is distinguished from the:

- **Central Services Manager** class which plans, organizes and manages the functions of central purchasing, mail services, duplicating and printing, records management, and surplus property; serves as Assistant purchasing Agent for the County; and serves a member of the County's senior management team.

SUPERVISION RECEIVED AND EXERCISED:

- Supervision is provided by the Central Services Manager.

ESSENTIAL DUTIES: This class specification represents the core area of responsibilities; specific position assignments will vary depending on the needs of the department.

- Manages the Countywide Records and Information Management (RIM) Program by:
 - overseeing and assisting in the development and implementation of records management services;
 - overseeing the Electronic Document Content (EDC) programs;
 - implementing standards to safeguard the County's records regardless of the medium (paper or electronic);
 - overseeing the conversion of paper-based records to electronic format;
 - developing standards and guidelines to keep electronic records in an accessible format;
 - leveraging scanning capabilities and software applications to accomplish conversion and maintenance of accessible electronic records; and
 - recommending ongoing records management improvements including best practices, technology applications, operational effectiveness, and training.
- Serves as liaison to County departments and provides technical records management assistance tailored to Department needs consisted with approved RIM, EDC and records retention governance standards, policies and procedures.

- Identifies, facilitates and ensures compliance with the Records and Information Management Governance Policy for the creation, processing, retention and ultimate disposition of paper and electronic records; monitors legislative proposals and advises County regarding impacts of proposed legislation as it pertains to programs of responsibility; and maintains and revises the Countywide records retention schedule, records transfer and disposal schedules in collaboration with County Counsel.
- Facilitates development and maintenance of electronic filing systems to meet administrative, legal and financial requirements.
- Upon direction, assists with the research and retrieval of public records requests, including historical records.
- Provides support and consultation regarding best practices of records management to departments that have legal responsible control over records.
- Monitors and makes recommendations to the Central Services Manager for the annual operational budgets for the Central Services Records Management Budget Unit, including mid-year and third quarter projections.
- May represents the office and the County in meetings with the public.
- Attends offsite training as required.
- Performs other duties of a similar nature or level as assigned.

EDUCATION AND EXPERIENCE:

Option I:

- **Education:** Associate's degree or higher from an accredited college or university with a major in Information Management, Library Science, Computer Science, Business or Public Administration or a closely related field;

AND

- **Experience:** Two years of full-time paid experience in records and information management, ~~including~~ archival records and electronic document management experience preferred.

Option II:

Possession of one or more of the following certifications may be substituted for the education and experience requirements listed above: Certified Records Manager (CRM) or equivalent as accredited by the Institute of Certified Records Manager (ICRM) or Association of Records Manager and Administrators.

LICENSING, CERTIFICATION AND REGISTRATION REQUIREMENTS:

- Applicants are required to possess a valid California Driver's License, Class C.

Note: All licenses, certificates and registrations must be kept current while employed in this class. This may include the completion of continuing education units to maintain the required registration in good standing. Employees must keep their licenses, certifications and

registrations current and failure to do so may constitute cause for personnel action in accordance with Civil Service Rules or applicable bargaining agreement.

REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:

- Laws, regulations and policies pertaining to records management and electronic content management, mail services processing and delivery, retention and destruction of government records, privacy rights and requirements for working with confidential records.
- Technology and information systems pertaining to records and electronic content document management (including archival document and collections management), mail-courier services, and office administration.
- Research techniques and information sources with local governments, libraries, and archives.
- Communicate clearly both orally and in writing.
- Customer service techniques for dealing with customers.
- English composition, spelling, grammar, vocabulary, and punctuation for both written and oral communications.
- Formats and appropriate terminology for written communications such as business correspondence, policies, procedures and narrative reports.
- Basic mathematics for developing, preparing and completing numerical and/or statistical reports.
- Standard office procedures, practices, equipment, personal computers, and software.

Skill and/or Ability to:

- Develop and implement operational procedures.
- Identify and analyze administrative problems and implement operational changes.
- Understand, interpret and apply applicable laws, regulations and policies and use good judgment in their application.
- Research laws, regulations, procedures and/or technical reference materials; analyze, evaluate and interpret the data gathered; draw logical conclusions; develop reasonable and deliverable options, make appropriate recommendations; and implement the resultant change effectively.
- Manage a variety of simultaneous work projects and carry them through to successful completion.
- Communicate information and ideas clearly and concisely, both orally and in writing.
- Work with and speak to various cultural and ethnic individuals and groups in a tactful and effective manner.
- Represent the office in meetings with representatives from various County and non-County organizations, with local businesses, with customers, and/or with the general public.
- Establish good relationships with the public and with customers and provide customer service that meets and exceeds unit goals and expectations.
- Prepare a variety of written communications to include reports, policies and procedures.
- Maintain accurate records and document actions taken.

- Perform a variety of technical and specialized tasks and functions in an independent, competent and timely manner.
- Maintain confidentiality of records and information per pertinent laws/regulations.
- Use modern office equipment to include computers and related software applications.

PHYSICAL REQUIREMENTS:

- Mobility and Dexterity: This class typically requires employees to perform the following: stooping, kneeling, reaching, standing, walking, fingering, grasping, feeling (i.e. sense of touch), and repetitive motion.
- Lifting, Carrying, Pushing and Pulling -- Medium work: This class typically requires employees to perform the following: exerting up to 50 pounds of force rarely, and/or up to 20 pounds of force frequently, and/or up to 10 of force constantly to move objects.
- Vision: This class typically requires employees to have close visual acuity, with or without correction, to prepare and analyze data and figures, transcribe, view a computer terminal, read, etc. This class requires employees to have depth perception in order to operate a motor vehicle.
- Hearing/Talking: This class typically requires employees to perceive the nature of sounds at normal speaking levels with or without correction, and have the ability to receive detailed information through oral communication. Employees in this class are also required to be able to communicate to express or exchange ideas.

WORKING CONDITIONS:

- Office Work: Employees in this class will most often be working in an office setting.
- Work in an Industrial Area: Employees in this class will make periodic site visits to off-site locations to observe storage locations for County's inactive records and thus will be subject to exposure to moving mechanical parts, inadequate lighting, intense noise, fumes, odors, and dust.
- Traffic Hazards: Employees in this class will be required to operate a vehicle and thus will be subject to traffic hazards while driving.
- Disruptive/Confrontational Human Contacts: Employees in this class may be subject to disruptive or confrontational people.

OTHER REQUIREMENTS:

- Background Checks: The County may conduct a background check and a reference check on candidates prior to appointment to a position within this class. The background check may include the State of California Department of Justice, the Federal Bureau of Investigation (FBI), the Child Abuse Central Index (CACI), and criminal checks in any City/County where the applicant has lived, worked or gone to school.
- Independent Travel: Incumbents are required to travel independently, for example, to perform work at other work sites, to attend meetings with other County employees, to attend meetings with community organizations, etc.

CLASS HISTORY AND CLASS INFORMATION:

- Date Approved by the Civil Service Commission: 10/18/2016

- Date(s) Revised: June 2017
- Class Code: 783300