



RECORDS RETENTION SUPERVISOR

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

Under general direction, plans, organizes, coordinates, and supervises employees in the District's centralized records management program function; ensures the proper management, retention, and disposal of District records and documents; ensures District compliance with applicable records retention laws, regulations, and mandates; and performs related duties as assigned. The District's program includes both paper and electronic records.

CLASS CHARACTERISTICS

This is a single position in a first-level supervisory class. The incumbent reports to the General Manager and is responsible for the overall administration, management, and implementation of the District's records (both electronic and paper) and retention program and activities. Incumbents are expected to perform job assignments with substantial independence, applying judgment and using knowledge of applicable laws, regulations and mandates governing records disposition, retention, destruction and archiving.

ESSENTIAL FUNCTIONS

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude the position if the work is similar, related or a logical assignment to the class.

- Plans and evaluates the performance of assigned staff within the records retention function; regularly monitors performance and provides coaching for performance improvement and development; assists in conducting records retention training for District staff.
- Advises departmental staff on best practices for scanning, indexing, retrieving and managing electronic records.
- Participates in the Hiring process, in accordance with Human Resources rules and procedures, for identified assigned staffing vacancies.
- Acts in the capacity of Custodian of Records
- Develops, implements and administers the District's records retention program including determining appropriate legal retention periods, revising and ensuring adherence with destruction schedules and determining the appropriate office of record.
- Manages and oversees the Districts records retention efforts to ensure compliance with applicable federal, state, and local laws, mandates and regulations.

- Establishes and maintains a vital records program including official records of the Board of Directors and other documents and files; develops and carries out standards and procedures for the archiving and retention of historic Agency records and documents.
- Responsible for evaluating and developing recommendations for enhancements to the District's records retention programs, systems and procedures; advises departments on the proper procedures for preserving, storing, retrieving, retaining and destroying records in accordance with established policies and procedures.
- Receives, assigns and performs audits of data entry and certification records.
- Administers the District-wide destruction of records in accordance with the records retention schedule, coordinating with all departments in the purging of electronic and paper-based files and coordination of the timely destruction of records.
- Oversees the disposition, retention, management and coordination of various District records; establishes indexing criteria, develops destruction schedules, establishes access and authority procedures for the retrieval of records; develops and updates records retention policies and procedures.
- Assists in the development of records retention budget and monitors applicable expenses; participates in developing, implementing and evaluating plans, work processes, systems and procedures to achieve annual goals, objectives and work standards.
- Develops, manages and implements records management and retention policies, processes and procedures.
- Attends and participates in professional groups; stays abreast of new trends and innovations in the field of records retention
- Works with the Information Technology Department to design, evaluate, and implement enhancements to division technology and/or new systems or software that increases efficiency and accuracy of records retention and archiving.
- Works with Information Technology to ensure that system administration activities are completed accurately and in a timely manner. (security, new users, setting up new folders when needed, etc.)
- Works cooperatively with other users, employees, department managers, outside vendors and customers.
- Responsible for the preparation of an assigned budget as items as it pertains to the records retention programs and area of responsibility.
- Performs related duties and responsibilities as required.

QUALIFICATIONS GUIDELINES

Knowledge of

- Principles, practices, methods and techniques of records management.

- The California Public Records Act.
- Federal, State, and local regulations and environmental standards pertaining to retention requirements for a wide variety of documents
- General functions of a municipal water/wastewater utility, joint powers authorities, Parks District, municipal financing and associated record keeping requirements.
- Research methods and processes.
- Recordkeeping and purchasing practices and procedures.
- Information storage and retrieval systems.
- Computer applications and capabilities for use in records retention programs.
- Microfilm, imaging and paper documents storage and processing.
- Principles and practices of effective business and public communication.
- The requirements and procedures associated with public agency records management and coordination.
- Data collection and analysis techniques.
- The use of standard office equipment, including personal computers and computerized applications related to administrative work.

Ability to

- Supervise, evaluate, develop and coach the performance of assigned staff.
- Develop, recommend and implement policies, programs, procedures, goals and objectives.
- Reach sound conclusions and recommend improved procedures and facilities; organize work, set priorities and provide advice and support to meet records retention needs
- Coordinate and oversee independent research studies with a high degree of accuracy.
- Maintain information and generate reports utilizing computer equipment; code, file and retrieve a wide variety of materials/documents under a comprehensive records retention system.
- Prepare clear and accurate reports and other written correspondence.
- Interpret, apply, explain, analyze, and make sound recommendations regarding the District records retention program and activities.
- Administer, oversee and coordinate the District records destruction processes.
- Prepare and manage records retention budgets, expenses and projects; oversee the work of contractors/consultants.
- Develop and maintain best practice in unit work processes and support a philosophy of continuous improvement.

- Present proposals and recommendations clearly and logically.
- Exercise sound, independent judgment within general policy guidelines.
- Operate a computer, calculating machine and other standard office equipment.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those encountered during the course of the work.

Education

Completion of 60 semester (or equivalent quarter) units from an accredited college or university that included major coursework in business administration, accounting, finance, human resources administration, economics or a related field.

Experience

Five years of increasingly responsible professional experience administrative experience involving the development and maintenance of detailed and complex records and legal documents. Experience in records management in a governmental setting is highly desirable.

Licenses/Certificates

- Possession of a valid California driver's license, Class C or higher, is required.
- A Certified Records Manager (CRM) certification from the Institute of Certified Records Managers must be obtained within one year from date of hire.
- Possession of, or ability to obtain, certification from District-provided CPR/First Aid training is required.

Physical Requirements

The following abilities are considered necessary to successfully perform the essential functions of this class; however, applicants who request accommodation will be considered on a case-by-case basis.

Ability to: communicate orally, in person and by telephone, in face-to-face, one-to-one, and group settings; sufficient manual dexterity to use office equipment such as computers, copiers, telephones and FAX machines; sit for extended periods of time; have hearing and vision within normal ranges; frequently lift, carry, push or pull 20 pounds; travel as necessary to conduct District business.

FLSA: Exempt
Range: 122
Union: Non-Represented