



## Limited-Term Records Coordinator

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### Summary

Perform a variety of complex, para-professional functions related to the coordination of records and information; responsible for implementation of the citywide records management program.

### Class Characteristics

General supervision is provided by the City Clerk.

The Limited-Term Records Coordinator is a single position classification that will evaluate the current records management system and implement a new robust citywide records management program.

Incumbents in this class perform routine to complex analytical or interpretive tasks involving City policies and procedures and specialized knowledge and experience related to records management. The Limited-Term Records Coordinator is distinguished from the Deputy City Clerk in that the latter class performs a full range of confidential and complex administrative duties in support of the City Clerk's Office, and may act as the City Clerk, while the Limited-Term Records Coordinator focuses on the development and implementation of the citywide records management program.

### Essential Duties, Skills, and Demands of the Position

*The duties, skills, and demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with a disability to perform the essential duties, skills, and demands.*

#### Duties:

Plan, implement, administer, and coordinate the activities and services of a citywide records management program designed to facilitate economical and effective handling of all medium of records (e.g., paper, electronic databases, compact disks, etc.).

Design and develop a citywide records management program; develop and establish methods, policies, procedures, and schedules for the systematic retention, transfer, storage, and disposal of records as required by law; monitor and oversee compliance with such policies, procedures, and schedules throughout the City.

Maintain accurate indices and other finding aids to ensure that the records database is adequately controlled; identify vital and historical records and recommend/implement proper procedures for their protection.

Evaluate and recommend the purchase of software, supplies, and equipment necessary for the preservation and protection of the public record.

Serve as system administrator for records management related software systems; serve as liaison between the City Clerk's Office and the Information Technology Department, updating and training users, overseeing system upgrades and configuration and advising and assisting with coordinating conversions of active records systems.

Assist the Information Technology Department with managing the electronic documents stored on the City's computer network; perform routine surveillance of department records stored on the City servers to determine compliance with document retention policies and document storage procedures.

Assist departments in implementing procedures and policies relating to the centralized storage of City records and documents; provide user training and support to department records liaisons.

Develop and conduct periodic City-wide training regarding laws, policy, procedure, and technological changes affecting records management activities; communicate records management procedures and policies effectively both orally and in writing.

Maintain records systems and procedures to facilitate the orderly retention and disposition of records; draft destruction notices, track, and facilitate the destruction process.

Oversee entry of records into the records management system to ensure accuracy and compliance with City standards and retention/disposition rules.

Recommend and administer updates to approved retention schedule, prepare final retention schedule drafts for review and approval; implement approved retention schedule.

Attend and participate in professional group meetings; maintain awareness of new trends and developments in the field of records management; incorporate new developments as appropriate.

Serve as the main contact for public records requests; assist and train other departments with public records requests; research and compile documents responsive to Public Records Act requests and subpoenas served on the City; accept, log, and coordinate responses for all Public Records Act requests, personal appearance subpoenas and subpoenas for records, summons, and complaints.

Coordinate the retrieval of records as requested and the approval and arrangement for destruction of records.

Receive, attest, log, and file City agreements and contracts.

Record documents in accordance with state and county requirements.

Schedule and arrange for meetings; organize work, set priorities, and meet critical deadlines.

Perform related duties as assigned.

Skills/Abilities:

Collaborate with other staff in the City Clerk's Office to plan, implement and administer an effective citywide records management program.

Develop and present training programs.

Compose correspondence independently or from brief instructions.

Type at a rate of 50 net words per minute from print copy.

Organize work, set priorities, meet critical deadlines, and follow up assignments.

Understand the importance of data integrity.

Maintain accurate and complex filing systems and departmental records; maintain confidentiality of information; recognize and respect limit of authority and responsibility; use good judgment and discretion in handling records and files.

Exercise independent judgment and initiative within general policy guidelines.

Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of the work.

**Physical Demands and Work Environment:**

While performing the duties of this job, the employee is regularly required to sit, stand, walk, use hands to finger, handle, or feel, and talk or hear. The employee frequently is required to reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and taste or smell. The employee must frequently lift and/or move weight up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus. While performing the duties of this job, the employee is frequently exposed to outside weather conditions. The employee is occasionally exposed to fumes or airborne particles. The employee occasionally works with use of vehicle. The noise level in the work environment is usually moderate.

**Qualifications**

**Knowledge of:**

Record keeping, report preparation, and filing methods and best practices.

Principles and practices of retention schedules and archives management.

Principles and procedures of automated records management.

Records management software systems and related system administration.

Correct English usage, including spelling, grammar, punctuation, and vocabulary.

Basic organization and function of public agencies.

Federal, state, municipal, City, and departmental laws, policies, rules, regulations, and procedures, including those regarding the preparation and retention of records.

Methods and techniques of researching and compiling information.

Indexing, organization and filing (alpha, numeric, chronological).

Computer applications related to the work.

Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.

Education and Experience

*Any combination equivalent to the education and experience likely to provide the required knowledge and abilities would be qualifying. A typical way to gain such knowledge and abilities would be:*

Education:

Equivalent to graduation from high school.

Training in records management is highly desirable.

Experience:

Two years of records management experience required; one year of municipal experience is desirable.

Certifications/Licenses:

Possession of a valid California Class C driver's license.

Possession of a Certified Records Manager (CRM) or Certified Municipal Clerk(CMC) credential is desirable.

Valid California Notary Public Commission or ability to obtain within one year of appointment.

Established: 10/18/21

Resolution #: 2021 – 170 N.C.S.

Department: City Clerk

FLSA Status: Non-exempt