

Job Description

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job.

Job title	Records Manager
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GENERAL PURPOSE

Under administrative direction, plans, organizes, and manages staff and operations of the District's centralized records management program function; develops, implements, and maintains records management policies, systems, and schedules for the organization, ensures the proper management, retention, and disposal of District records and documents; ensures the timely response to public records and legal requests; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

This is a management classification responsible for planning, organizing, reviewing, and evaluating staff and operation of a centralized Records Management function. Incumbents exercise independent judgment on diverse and specialized records management issues, with significant accountability and decision-making responsibilities. Incumbents develop and manage departmental budgets, and are responsible for developing and implementing policies and procedures, and for planning, organizing, reviewing, and evaluating the work of assigned staff. Incumbents serve as a professional-level resource for organizational, managerial, and operational analyses and studies. Performance of the work requires the use of considerable independence, initiative, and discretion within broad guidelines.

SUPERVISION RECEIVED AND EXERCISED

Receives administrative direction from the Senior Director of Administrative Services. Exercises direct supervision over professional and technical staff.

TYPICAL DUTIES AND RESPONSIBILITIES

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 them from the position if the work is similar, related or a logical assignment to this position.

- Plans, organizes, supervises, trains, and evaluates the performance of assigned staff; establishes performance requirements and personal development targets; regularly monitors performance and provides coaching for performance improvement and

development; recommends compensation and provides other rewards to recognize performance; subject to management concurrence, takes disciplinary action, up to and including termination, to address performance deficiencies, in accordance with the District's rules, policies and labor contract provisions; identifies best-of-class work practices among assigned staff and ensures uniform adoption of those practices.

- Provides day-to-day leadership and works with staff to ensure a high performance, customer service-oriented work environment which supports achieving the department's and the District's mission, strategic plan, objectives and values.
- Participates in the development and implementation of goals, objectives, policies, and priorities for assigned services and programs; identifies resource needs; recommends and implements policies and procedures, ensuring alignment with the District's strategic and operational plans.
- Manages and participates in the development and administration of the department's annual budget; directs the forecast of additional funds needed for staffing, consultants, contractors, equipment, materials, and supplies; directs the monitoring of and approves expenditures; directs and implements adjustments as necessary to meet changing conditions.
- Manages, directs, and organizes the daily functions, operations, and activities related to centralized Records Management operations including complex records requests, and provides technical assistance regarding public records inquiries and the Public Records Act.
- Monitors and responds to inquiries regarding public records and the Public Records Act; confers with the Legal Department to justify any nondisclosure and/or deletion of any portions that are exempt from the mandate of the Public Records Act; provides assistance to the public, helping to identify records and information relevant to the request and ensures a timely response to all requests.
- Leads development and implementation, and administers the use of records management systems and technologies; coordinates with the District's information technology staff and document management vendors to ensure reliable, high quality operation of document management systems.
- Develops and maintains a comprehensive Records Retention Schedule in compliance with State law and professional rules and guidelines.
- Oversees the maintenance, update, and disposal of electronic and hard-copy records including the District's offsite records storage program; revising destruction schedules and coordinating the destruction of records with departments.
- Monitors and reviews legislation and legal requirements and recommends changes to achieve legal compliance and effective records management.

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- Audits and evaluates external department records management practices and performance; provides training and resources to ensure organizational compliance.
- Prepares reports and written recommendations for the Board of Directors.
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- Ensures staff observe and comply with all District and mandated safety rules, regulations, and protocols
- Performs other duties as assigned.

Continuous Improvement Related Duties:

- Applies Continuous Improvement principles in the deployment of department business plans, processes and performance measures, ensuring that they align with the District's Strategies and Operational Plans.
- Participates in departmental performance assessments and the system of continuous improvement and effectively integrates and evaluates the linkages between the District's key value creation and support processes and related key performance indices.
- Ensures effectiveness of the business processes undertaken by the department and division.
- Defines customer service segments being served and establishes processes to obtain feedback to improve performance.
- Develops, maintains, and utilizes departmental performance indicators in making decisions.
- Establishes performance criteria for assigned staff.
- Ensures a thorough understanding of the Strategic Planning Cycle with each individual's responsibility associated with the cycle.
- The incumbent, while exercising his/her authority, shall abide by and promote the District's values and beliefs and adhere to the District's ethics policy.

REQUIRED QUALIFICATIONS

Knowledge of:

- Principles and practices of employee supervision, including work planning, assignment review and evaluation, discipline, and the training of staff in work procedures.
- Principles and practices of leadership.

- Organization and management practices as applied to the development, analysis, and evaluation of the programs, policies, and operational needs of the assigned area of responsibility.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Administrative principles and methods including goal setting, program development and implementation.
- Principles and practices of budget preparation and administration.
- Principles and practices of records management including electronic and hard copy records retention and disposal.
- Modern document management systems and use strategies in a large, centralized records management operation.
- Local, state, and federal laws relating to retention requirements for a wide variety of documents.
- California Public Records Act and related rules, guidelines and procedures.
- District personnel rules, policies and labor contract provisions.
- Principles and practices of sound business communication.
- District and mandated safety rules, regulations, and protocols.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Continuous Improvement Based Knowledge:

- The core values, concepts, and framework of continuous improvement criteria, including the principles of management by fact, and organizational and personal learning.
- The means of developing alignment between strategic goals and individual performance standards.
- Practices of process mapping (control); practices of structured problem solving.
- The Strategic Planning Cycle and the various responsibilities within that cycle.
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Ability to:

- Select and supervise staff, provide training and development opportunities, ensure work is performed effectively, and evaluate performance in an objective and positive manner.

- Develop and implement goals, objectives, practices, policies, procedures, and work standards.
- Provide administrative and professional leadership and direction for the Records Management division and the District.
- Prepare, administer and monitor a division/department budget.
- Analyze complex situations, evaluate alternatives and recommend or adopt effective courses of action.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Code, file, and retrieve a wide variety of materials under a complex, comprehensive records management system.
- Prepare clear and concise reports, correspondence, procedures, and other written materials.
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- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and the District in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Continuous Improvement Based Abilities:

- Develop a systems perspective for managing department operations and its key process to achieve results.
- To use the seven continuous improvement categories and the core values as building blocks for department operations.
- Define and explain key processes and process requirements within the department.
- Develop and deploy strategic plan elements and key performance measures consistent with District goals.
- Develop and maintain written procedures for key processes, with performance standards related to legal requirements, and customer and stakeholder needs.

- Validate customer requirements; create a workplace that values employees, encourages their development, values their participation, and encourages innovation.
- Develop and maintain continuous improvement in all areas of operations.
- Develop and monitor performance standards for all divisions within the department.

Experience:

Any combination of experience and education that provides the required knowledge and abilities is qualifying, along with the specific licenses/certifications as outlined below:

- Five (5) years of increasingly responsible administrative experience involving the development and maintenance of detailed and complex centralized records and legal documents, of which one (1) year is in a lead or supervisory capacity.

Education:

- Equivalent to a bachelor's degree with major coursework in archives and records management, information management, business or public administration, or a related field.

Licenses/Certifications:

- Certification as a Records Manager (CRM) is desirable.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

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 and over the telephone. This is primarily a sedentary office classification although standing in work areas 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 bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds or heavier weights, in all cases with the use of proper equipment and/or assistance from other staff.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable

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accommodations may be made to enable individuals with disabilities to perform the essential functions.

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.

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This job description has been reviewed and approved by all levels of management in cooperation with the union (if applicable):

Approved by:	Board of Directors
Date adopted:	October 2, 2019
Date modified:	August 2022
FLSA determination:	Exempt

Job Description Acknowledgment

I have received, reviewed and fully understand the job description for Records Management Supervisor/Contracts Specialist. I further understand that I am responsible for the satisfactory execution of the essential functions described therein, under any and all conditions as described.

Employee Name (print): _____ Date: _____

Employee Number: _____

Employee Signature: _____