



PERSONNEL COMMISSION

Class Code: 5145
Salary Range: 31 (S1)

RECORDS SUPERVISOR

JOB SUMMARY

Under general supervision, plan, organize, oversee and participate in the operations and activities of the District's Records Management Office; coordinate the records management and retention process with District offices and schools; train and supervise the performance of assigned staff; perform related duties as assigned.

EXAMPLES OF DUTIES

The classification specification does not describe all duties performed by all incumbents within the class. This summary provides examples of typical tasks performed in this classification.

- Plan, organize, oversee and participate in the operations and activities of the District's Records Management Office; assure smooth and cost efficient office operations. **E**
- Train and supervise the performance of assigned staff; assign, schedule and review the work of staff; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions. **E**
- Coordinate the records management and retention process with District offices and schools; conduct meetings and trainings for District staff related to records management. **E**
- Plan, organize and oversee storage, vault and warehousing methods and facilities for District records; research and implement computerized technologies and software to streamline and automate records retrieval and storage; scan records into computerized database. **E**
- Communicate with administrators, personnel, outside agencies and vendors to coordinate activities, resolve issues and exchange information. **E**
- Visit schools and offices to provide information and assistance related to records retention, storage, microfilming, scanning, photocopying and destruction of records; drive a vehicle to conduct work. **E**
- Oversee and participate in classifying, assigning numbers, scanning, microfilming, proofing, indexing, filing, storing and destroying District documents in accordance with established legal requirements. **E**
- Answer telephones and greet and assist visitors; respond to inquiries; provide information to students, staff and the public regarding records management procedures and requirements; search files and records to retrieve requested material and information. **E**

- Collect record retrieval fees and make deposits in accordance with established procedures; maintain related financial records. ***E***
- Prepare student records and other requested information for court subpoenas; inform students or parents of subpoenaed information as appropriate. ***E***
- Request, receive and process student transcripts from schools; assure incoming transcripts are complete and accurate; provide transcripts to other agencies according to established procedures; issue receipts. ***E***
- Provide recommendations concerning records storage needs and supplies and the purchase of new records equipment and software; evaluate and make recommendations regarding vendor proposals and service contracts. ***E***
- Operate a variety of office and records equipment including a microfilm camera, reader/printer, copier, scanner and a computer and assigned software. ***E***
- Monitor and maintain inventory levels of supplies and equipment; estimate and order appropriate amounts of paper and supplies necessary for daily operations. ***E***
- Participate in the development of the office's preliminary annual budget; monitor and control expenditures in accordance with established limitations. ***E***
- Prepare and maintain a variety of records, files and reports related to assigned activities and office performance. ***E***
- Attend and participate in meetings, conferences and seminars related to reprographics to maintain current knowledge of advances in the field. ***E***

*Note: At the end of some of the duty statements there is an italicized **E**, which identifies essential duties required of the classification. This is strictly for use in compliance with the Americans with Disabilities Act.*

DISTINGUISHING CHARACTERISTICS

The Records Supervisor plans, organizes, oversees and participates in the operations and activities of the District's Records Management Office. The incumbent assures legal records requirements are understood and followed by District staff and assists offices and schools in meeting records management and retention requirements.

EMPLOYMENT STANDARDS

Knowledge of:

Legal requirements and procedures governing classification, identification, management, release, and retention of District information and records.

Records management and storage practices.

Modern principles and practices of office management, record keeping and filing systems.

Principles of supervision and training.

District organization, operations, policies and procedures.

Operation of a variety of office and records equipment including a microfilm reader/printer, copier, scanner and a computer and assigned software.

Record-keeping and report preparation techniques.

Telephone techniques and etiquette.

Inventory methods and practices.
Basic budgeting practices regarding monitoring and control.
Interpersonal skills using, tact, patience and courtesy.
Oral and written communication skills.
Mathematical computations.

Ability to:

Plan, organize, oversee and participate in the operations and activities of the District's Records Management Office.
Plan, organize and oversee storage, vault and warehousing methods and facilities for District records.
Train and supervise assigned staff.
Operate a variety of office and records equipment including a microfilm reader/printer, copier, scanner and a computer and assigned software.
Establish and maintain cooperative and effective working relationships with others.
Monitor and control expenditures.
Interpret, apply and explain applicable laws, codes, rules, regulations, policies and procedures.
Understand and resolve issues, complaints or problems.
Work independently with little direction.
Prioritize and schedule work.
Meet schedules and timelines.
Maintain records and files and prepare reports.
Complete work with many interruptions.
Communicate effectively both orally and in writing.
Perform mathematical calculations.

Education and Training:

Graduation from high school or equivalent. Completion of college-level coursework in records management, business administration, public administration or closely related fields is desirable.

Any other combination of training and/or experience which could likely provide the required knowledge and abilities may be considered.

Experience:

Three years of experience overseeing a comprehensive records management program or responsibility for oversight of student records, preferably with a unified school district. Experience in a lead or supervisory capacity is highly preferred.

SPECIAL REQUIREMENTS

Positions in this class require the use of a personal automobile and possession of a valid California Class C driver's license.

Positions in this classification may require the ability to communicate effectively, both orally and in writing, in a language other than English. Selective certification in accordance with the Education Code may be effected to meet this requirement.

WORKING ENVIRONMENT

Office and warehouse environment.
Driving a vehicle to conduct work.
Constant interruptions.

PHYSICAL DEMANDS

Hearing and speaking to exchange information and make presentations.
Dexterity of hands and fingers to operate a computer keyboard and microfilm equipment.
Seeing to read a variety of materials.
Sitting or standing for extended periods of time.
Lifting, carrying, pushing or pulling carts and boxes weighing approximately 25 pounds.
Bending at the waist, kneeling or crouching to retrieve files and records.
Reaching overhead, above the shoulders or horizontally to retrieve files and records.

AMERICANS WITH DISABILITIES ACT

Persons with certain disabilities may be capable of performing the essential duties of this class with or without reasonable accommodation, depending on the nature of the disability.

APPOINTMENT

In accordance with Education Code Section 45301, an employee appointed to this class must serve a probationary period of six months during which time an employee must demonstrate at least an overall satisfactory performance. Failure to do so shall result in the employee's termination.