POSITION DESCRIPTION

TITLE: Records Retention Lead
LOCATION: Administrative Service Center
REPORTS TO: Director, IT Applications Services
DEPARTMENT: Information Technology

SUMMARY STATEMENT:
Plan, organize, oversee, and lead operations of Record Management, Electronic Information, Image Management, Archive Management and Disposition Management to ensure information is processed efficiently and effectively. Includes analyses and recommendations on retention policies and procedures for individual departments and schools in accordance with state and federal regulations.

ESSENTIAL FUNCTIONS:
1. Oversee and coordinate daily work for Record Center staff.
2. Establish priorities and direction for operations and staff to obtain department goals. Review department performance and, if necessary, makes changes to meet requirements of the District.
3. Develop and oversee training for staff.
4. Provide job performance information for Director of IT Application Services.
5. Develop and implement policies and procedures for Evergreen Public Schools Records Management Program.
6. Create, maintain, and update retention schedules for departments and schools.
7. Work with departments, schools, agencies, and other school districts on research and retrieval to ensure that all information needs are met.
8. Plan, schedule, and assign work tasks in all areas of record storage, which includes electronic imaging.
9. Assist with Records Center budget and review with Director of IT Application Services.
10. Justify and recommend purchase, disposition, or acquisition of equipment and supplies.
11. Prepare statistical reports on all phases of records and information as needed.
12. Ensure efficient utilization of storage space.
13. Provide training in Record Management for departments and schools.
14. Consult with users and vendors on automated record management applications and make recommendations on hardware and software for further research by Information Technology department.
15. Manage District-wide records retention regardless of type of media storage and ensure adherence to legal requirements which affect the information of the District.
16. Ensure confidentiality, security, and preservation of records and record information stored.
17. Maintain up-to-date records management information and legal requirements through involvement with membership in professional organizations, involvement with state records meetings, literature review and special courses.
18. Oversee disposition of obsolete records according to state regulations.
19. Perform other incidental tasks consistent with the goals and objectives of this position.

OTHER RESPONSIBILITIES:
1. Other related duties as assigned.

PHYSICAL DEMANDS REQUIRED:
- Vision (66-100%)
- Hearing (66-100%)
- Sitting (66-100%)
- Reaching (66-100%)
- Acceptable Attendance
- Standing (66-100%)
- Walking (66-100%)
- Use of hands and/or arms for repetitive motion (66-100%)
- Lifting/carrying up to 50 lbs. (66-100%)
- Bending/Stooping (66-100%)
- Climbing (Stairs/Ladders) (33-66%)
MENTAL DEMANDS REQUIRED:

<table>
<thead>
<tr>
<th>Task</th>
<th>requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading documents</td>
<td>66-100%</td>
</tr>
<tr>
<td>Problem solving</td>
<td>66-100%</td>
</tr>
<tr>
<td>Multiple concurrent tasks</td>
<td>66-100%</td>
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<tr>
<td>Confidentiality</td>
<td>66-100%</td>
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<tr>
<td>Verbal communication</td>
<td>66-100%</td>
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<tr>
<td>Detailed work</td>
<td>66-100%</td>
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<tr>
<td>Constant interruptions</td>
<td>66-100%</td>
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<tr>
<td>Reasoning</td>
<td>66-100%</td>
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<tr>
<td>Written communication</td>
<td>66-100%</td>
</tr>
<tr>
<td>Training</td>
<td>33-66%</td>
</tr>
<tr>
<td>Customer contact</td>
<td>66-100%</td>
</tr>
</tbody>
</table>

Percentages of requirements of physical and mental tasks are only an estimate. Reasonable accommodations for persons with a disability will be considered in order for them to perform the essential functions of the job.

(66-100%) = Continuously  
(33-66%) = Frequently  
(Up to 33%) = Occasionally

TOOLS AND EQUIPMENT NECESSARY:

Computer, telephone, typewriter, printer, 10-key calculator, copy machines, FAX machine, microfilm reader, document scanner and all other tools and equipment necessary to perform the essential functions as listed above.

MINIMUM QUALIFICATIONS:

(Testing may be required.)

1. Minimum of 3 years experience in related field or equivalent training.
2. Thorough knowledge of the field of records and information management and retention schedules.
3. Demonstrated ability to communicate effectively, both orally and in writing, and possess a positive attitude.
4. Demonstrated ability to operate the office equipment listed above.
5. Demonstrated ability to perform on the computer, using Windows environment and related applications.
6. Demonstrated ability to perform tasks accurately and in accordance with established guidelines.
7. Ability to plan and organize work.
8. Ability to perceive and analyze problems, develop alternatives and make or recommend solutions.
9. Ability to oversee effectively and coordinate the resources available for effective work processes.
10. Knowledge of technology applications relevant to record management environment.
11. Demonstrated ability to maintain confidentiality of sensitive information.
12. Demonstrated ability to establish and maintain positive relationships with others as part of a team.
13. Demonstrated ability to work under conditions of constant interruption and perform under deadline pressure.
14. Must be able to travel from location to location and attend various informational meetings out of the area.

260-261 Days Per Year (Includes Holidays)
8 Hrs. Per Day

PSE: ___________________________ Date: _______________

District: ___________________________ Date: _______________

Revised Date: 05/18/2018
Classification: Professional Technicians - Office Clerical
Class: Class V
Display on Web? Yes

Records Retention Lead