

JOB DESCRIPTION

Coachella Valley Water District

Date: March 2021

TITLE: Records Manager

SECTION: Records

DEPARTMENT: Administration

SRN S23:

REPORTING RELATIONSHIP:

Reports to: Clerk of the Board

Supervises the following positions: Records Clerks, Office Assistant and Receptionist

DEFINITION: Directs, plans, organize and supervise the work of a staff engaged in varied records management activities; is responsible for the receipt, recording and distribution of mail , ensures Records Retention policy is followed district wide.

CLASS CHARACTERISTICS: This is a single position class. The principle duties of this position are the supervision and coordination of a clerical staff. Incumbents personally perform the difficult and responsible tasks which require exercising of independent judgement and a thorough knowledge of departmental rules, activities, procedures, policies and precedents.

ESSENTIAL FUNCTIONS:

1. Manages records department work activities and records retrieval for district departments, ensures that records are adequately stored, confidentially and securely maintained, and destruction of records is timely and accurate.
2. Manages Districts records retention program, including appropriate legal retention periods, reviewing and revising destruction schedules, establishing new file categories, develops and revises filing criteria, develops and updates document management procedures.
3. Provides day to day leadership and works with staff to ensure a high performance, customer service oriented work environment which supports achieving the departments and districts mission and strategic plan objectives.
3. Administers the District-wide destruction of records in accordance with the records retention schedule including the preparation of Resolutions of Destruction, working with all departments in the purging of electronic and paper-based files.
4. Supervises the receipt, recording and distribution of district mail.
5. Develops and implements departmental procedures and work processes.
6. Develops and conducts records management training for District employees.

ESSENTIAL FUNCTIONS (Cont.):

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7. Checks letters, reports, records, and other data for accuracy, completeness and compliance with established standards.
8. Compiles payroll records.
9. Evaluates and participates in the selection of new equipment.
10. Participates in the process of hiring Records Clerks, provides training and evaluates performance and works with employees to correct deficiencies.
11. Prepares annual budget for Records management department and monitors expenditures.
12. Serves on various committees and sub-committees.
13. Monitors and oversees the funding for the District's mailing expenses.
14. Oversees and manages the Copy Center Mailroom.
15. Personally performs the more difficult assignments.

MINIMUM QUALIFICATIONS:

License or Certificates: Valid California Operators license issued by the State Department of Motor Vehicles. Department of Motor Vehicles driving record may influence employment or classification.

AND

Certification as a Records Manager CRM is desired.

Experience: Any combination of training and experience which would likely provide the required knowledge and abilities is qualifying. A typical way to obtain this would be to have five years of increasingly responsible experience and/or two years of supervision experience.

Knowledge of:

- Procedures and legal requirements necessary to maintain, archive, preserve district records.
- local, state and federal laws relating to records retention requirements for a wide variety of documents
- general functions of the district as it relates to records
- Procedures, specific rules and precedents of the departments together with the ability to apply them with good judgement in a variety of cases.
- Pertinent policies and procedures of the district.
- Principles of supervision and training.
- Modern filing methods.
- correct English usage, including spelling, grammar and punctuation
- Principals and practices of supervision, performance evaluation and training
- Public Records Act
- Budget preparation.
- Common office equipment and computer operation.

Abilities: -Plan, organize, direct, set priorities and coordinate the work of the staff.

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- Understand, interpret and apply general and specific administrative and department policies and procedures as well as applicable federal, state and local policies, laws and regulations.
- Stay abreast of new technologies
- Train new employees.
- Analyze situations and make decisions in procedural matters without immediate supervision.
- Prepare and maintain accurate and complete records and reports.
- Work tactfully, effectively and courteously with people contacted in the course of work.
- Establish operational procedures and make improvements in departmental operation.
- interpret information and data
- Communicate effectively with others both verbally and in writing
- Maintain confidentiality when presented with sensitive information.
- Prepare budgets.
- Operate a computer work station.

PHYSICAL REQUIREMENTS:

Driving: Light

See Human Resources for physical assessment form.

I acknowledge that this job description is an accurate representation of this position as of this date.

Department Head approval _____ Date _____

General Manager approval _____ Date _____