

Email Address: helpmeapply@lausd.net
Contact: Alex Herrera

RECORDS MANAGER

DEFINITION

Manages, plans, and coordinates the District's comprehensive records management function.

TYPICAL DUTIES

Oversees the physical storage of millions of documents stored District-wide safeguarding the confidentiality and privileges related the documents.

Oversees hardcopy and electronic document destruction at the direction of the District's designated Custodian of Records.

Prepares guidelines, protocols and metrics for reporting on the implementation and execution of the policies related to document and retention policies.

Develops the scope of work of contracts and task orders for vendors and contractors providing document and record retention and destruction services.

Oversees the classification of documents and ensures compliance with required retention periods.

Provides information to District personnel, and as directed by the designated Custodian of Records, concerning general District policies and procedures and specific policies and procedures applicable to records.

Acts as the primary liaison with other divisions, executive staff, and the Board regarding records retention and destruction.

Prepares analysis of cost proposals, budgets, and other facets of financial management as related to the records retention and destruction policy.

Supervises personnel engaged in the implementation and execution of retention and destruction of records.

Consults with management and advises regarding the activities and status of the records retention and destruction policy.

Coordinates training activities for the project team.

Develops and implements a District-wide client education and training program regarding the retention and destruction of records.

Assists schools and offices with identifying and implementing green strategies.

Creates scanning protocol and implement function into the document storage protocol.

Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

The Records Manager manages District-wide document storage and disposal activities.

The Director of Leasing and Asset Management manages the District's physical assets and property with respect to tracking inventory, assessing valuation and depreciation, determining life cycles, resolving lease vs. buy issues, and administering the sale, auction, and disposal of assets.

SUPERVISION

General supervision is received from the District's designated Custodian of Records and the Director of Leasing and Asset Management or their designee. Supervision is exercised over lower level staff.

CLASS QUALIFICATIONS

Knowledge of:

- Document management, including various storage and retrieval platforms.
- Document retention periods, including experience with education code requirements and applicable law
- Microsoft Office including Power Point.
- Request for qualification (RFQ), request for proposal (RFP) and contracting procedures
- Principles of Project Management
- General knowledge of internal controls
- Principles and procedures of governmental practices of public administration particularly as related to a large school district
- Administrative practices and procedures within the District
- Organization and functions of the District administration

Ability to:

- Work in a dynamic environment with multiple clients
- Apply new codes and regulations to practical applications
- Manage millions of documents efficiently and discretely
- Build client confidence
- Develop effective working relationships with stakeholders
- Implement and comply with current record management policies
- Estimate project requirements and organize resources to meet goals and deadlines
- Communicate effectively both verbally and in writing

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university with a bachelor's degree in Library Science, Planning, Public Administration, Business Administration or a related field. Additional qualifying experience beyond that required may be substituted for up to two years of the required education on a year-for-year basis. Certification as a Records Manager (C.R.M.) by the Institute of Certified Records Manager (ICRM) is preferable.

Experience:

Two years of comprehensive records management experience managing all documents for a government entity agency-wide or four years of comprehensive records management experience managing documents in the private sector. Experience managing documents for a school district is preferable.

Special:

A valid California Driver License.
Use of an automobile.

This class description is not a complete statement of essential functions, responsibilities, or requirements. Requirements are representative of the minimum level of knowledge, skill, and/or abilities. Management retains the discretion to add or change typical duties of a position at any time.

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