

**CLASS SPECIFICATION**  
**Archives & Records Management Coordinator**

FLSA Status: Exempt  
Union Representation: Nonrepresented

**GENERAL PURPOSE**

Under general supervision, leads one or more citywide Archives & Records Management (ARM) programs or functions, such as the archives collection development, electronic records management system, or records management; develops program goals and deployment plans; monitors program growth and performance; identifies process improvements; develops and recommends policies and procedures; provides training, advice, and guidance on program topics; ensures City compliance with relevant state and federal regulations; and performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

Archives & Records Management Coordinators have primary responsibility for particular Archives and Records Management Division program areas that have high-level or city-wide impact. Incumbents provide leadership and guidance on their assigned program areas, promote the fulfillment or expansion of overall program goals, and providing training and expertise to ARM staff and bureau employees. Current positions focus on the archives collection development or records management, with a specific focus on electronic records management, but also contribute to a variety of ARM activities supporting all areas of ARM, including the Portland Archives and Records Center (PARC), archives, records, training, and public record requests.

The ARM Coordinator is distinguished from the Senior ARM Specialist by the former's responsibility for oversight of an overall city-wide program and higher level of experience and expertise in archives and records management.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

Any one position in this class may not perform all the duties listed below, nor do the listed examples of duties include all similar and related duties that may be assigned to this class.

1. Develops, recommends and implements program plans to meet overall program goals; develops and recommends program policies and operating and administrative procedures; identifies program issues and develops solutions or policy initiatives to address issues and recommends changes; plans and implements work activities; provides program-related training and guidance; provides expert advice and consultation on assigned program areas; serves on committees representing the ARM program.

2. Oversees the city-wide deployment and implementation of the City's electronic records management system (ERMS); serves as the project manager for implementation of the ERMS; determines roll-out timelines and steps; establishes milestones; works with bureaus to determine best manner of deployment; develops training materials; trains users and provides on-going user support; clarifies and interprets bureau needs and challenges; leads ARM's response to electronic records preservation and access issues; promotes the expanded use of the ERMS (TRIM).
3. Contributes to legal mandates regarding public records through the management of public records retention schedules and the support of citywide records management activities; develops and updates schedules in consultation with bureau management, city attorneys, and the State Archives; ensures that all types of City records are identified and appropriate retention schedules are developed to comply with state law and federal regulations; reviews retention schedules on a regular cycle to assess compliance.
4. Provides administrative and technical guidance to bureaus regarding improved filing and record-keeping systems for both paper and electronic records, long-term retention of electronic records, preservation of historical records and response procedures for public record requests.
5. Oversees the archives collection development function; recommends collection strategy and collection development policies; identifies gaps in the overall collection; performs macro appraisal of specific collections to assess how they fit with the rest of the collection, if they meet collection development policy and to identify collection issues, such as preservation, conservation, storage, and access; establishes processes for donations and accessions; manages donor relations and performs donor outreach; prioritizes archival processing projects.
6. Provides collection preservation expertise; develops processing and preservation plans for ARM staff to follow; establishes standards and methods for assessing and processing records and collections.
7. Develops exhibit concepts; oversees exhibit development and production.
8. Administers the City's electronic records management system (TRIM); manages system upgrades; creates reports; evaluates efficiency and effectiveness of the system and recommends changes; assesses security of records; leads ERMS assigned staff.
9. Provides extensive reference services for the public and City employees; determines relevant records to provide to researchers and public records requestors; provides oversight of the Research Room and backup to the Senior ARM Specialist in daily operation of the Research Room; serves as lead for a variety of aspects of Records Center work.
10. May oversee volunteer, casual, work study and intern workers; assists with hiring and training; oversees work progress and provides quality control; serves as trainer and mentor for assigned staff.

11. Contributes to the overall operation of the PARC and the ARM division; provides backup the City Archivist on administration of the Portland Archives and Records Center; performs high-level customer support in all areas of ARM; helps create and implement policies and procedures; leads and assists with special projects as directed; creates and conducts training for all types of ARM functions; represents Archives and Records Management on City, professional or community committees or events.

## **MINIMUM QUALIFICATIONS**

### **Knowledge of:**

1. Provisions of local, state and federal laws and regulations governing records retention and access.
2. Professional archives and records management theories, principles, practices, and procedures; including retention scheduling, archival processing, storage, public access, destruction, appraisal, and preservation techniques.
3. Knowledge of electronic records including, current trends, tools, best practices, policy development, systems analysis and systems development concepts, and common issues associated with electronic records, including data storage methods, media, and security.
4. Research techniques, methods and procedures
5. Donor relations practices and techniques.
6. Principles and practices of sound business communication.
7. Personnel practices and policies
8. Project management principles.

### **Ability to:**

1. Analyze record keeping systems, security and access controls; identify issues and areas of improvement and recommend policy changes, systems and equipment to address them.
2. Process records in all forms according to professional standards, including archival records.
3. Manage electronic records according to best-practices.

4. Apply knowledge about electronic records issues, systems analysis, systems development concepts and data storage methods, media, and security to the development and management of an electronic records management program.
5. Exercise independent judgment and make decisions with minimal direct oversight or guidance.
6. Communicate effectively orally and in writing.
7. Perform mathematical and statistical calculations and analyses sufficient to track and report activities.
8. Plan and manage multiple simultaneous projects.
9. Direct the work of a variety of types and levels of employees.
10. Plan, organize, set priorities and accomplish tasks with minimal supervision.
11. Establish and maintain good working relationships with other employees, representatives of other agencies, public officials and the public.
12. Define difficult management and administrative issues, perform detailed analyses and research, evaluate alternatives and develop sound conclusions and recommendations.
13. Understand, interpret, explain and apply city, state and federal policy and regulations.
14. Understand, interpret and explain archives and records management principles and practices to a variety of audiences.
15. Present proposals and recommendations clearly, logically and persuasively in public meetings.
16. Pass all phases of the physical capacities test.

**Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from a recognized college or university with a master's degree in library and information science, archives management or history with an archives certification, or a closely-related field; and five years of archives and records management experience in a government agency; or an equivalent combination of training and experience.

**Licenses; Certificates; Special Requirements:**

Certification as a Certified Records Manager is desired, but not required.

**PHYSICAL AND MENTAL DEMANDS**

Lift, pull, push and carry boxes the weigh up to 40 pounds. Climb eight-foot ladders while carrying boxes that may weigh up to 40 pounds.

Persons with disabilities may be able to perform the essential duties of this class with reasonable accommodation. Reasonable accommodation will be evaluated on an individual basis and depends, in part, on the specific requirements for the job, the limitations related to disability and the ability of the hiring bureau to accommodate the limitation.

**Class History:**

Adopted: 12-3-14

Revised: