

**CLASS SPECIFICATION**  
**Archives & Records Management Specialist**

FLSA Status: Covered  
Union Representation: Nonrepresented

**GENERAL PURPOSE**

Under supervision, performs a variety of activities related to archives management and records management; works with City records in various formats; provides City employees and the public with access to records within Archives and Records Management Division (ARM) jurisdiction; assists with research requests, archival projects, ARM training and the management of electronic records in TRIM; and performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

The Archives and Records Management (ARM) Specialist performs entry-level professional work with some independence, but clear direction, guidelines and moderately close supervision. Individual incumbents may have a primary focus, such as managing the stacks or accessioning new records, but all positions will have a variety of functions, and perform or support both archives and record management activities.

The ARM Specialist is distinguished from the Senior ARM Specialist by the Senior Specialist's responsibility for providing lead direction and greater independence for assigned functions, which are typically higher level and more complex.

**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. Performs accessioning of new records, including preliminary sorting, recording the essential identifying information about the records and their creator, and providing suitable initial storage; informs bureaus of policies and procedures for storing records and assists them with properly identifying and choosing appropriate retention schedules; verifies that contents of boxes match the requirements of the retention schedule; enters or imports box data into electronic records management system (TRIM); assigns a unique address to each box; stores records in stacks.
2. Manages the stacks at the Portland Archives and Records Center (PARC); maintains accurate inventory of the physical records; monitors safety and security of records, equipment and the stacks; maintains the physical condition of the boxes, shelving and stacks area overall; keeps electronic records management systems updated.

3. Responds to City employee records requests; locates and retrieves requested files, tracks the transaction in TRIM; transfers the files using the appropriate delivery service; refiles returned records and records the transaction in TRIM.
4. Manages the records destruction process for electronic records in TRIM and physical records at the PARC; determines correct search strategy to compile records eligible for destruction; generates destruction lists; communicates with bureaus and gets appropriate sign-off; stages records for destruction; ensures records are destroyed and electronic records management system is updated appropriately
5. Provides reference and research assistance to bureaus and the public; applies entry-level understanding of how reference works in responding to routine requests that are clear or require minimal consultation and discussion with requestor; utilizes database and indexes; assists in the research room by providing supervised backup to the Senior ARM Assistant, which can include conducting reference interviews to clarify research questions and required records, and providing on-site supervision of the Research Room.
6. Provides individual or small group training on a variety of archives and records management topics; participates in training development; performs training for individuals or small groups on routine topics; assists with training sessions on more advanced topics and with larger groups; prepares supplements and handouts.
7. Assists higher level ARM staff with conducting records surveys within bureau offices, developing records retention schedules, and creating bureau file plans; interviews City staff to identify records that are created and maintained; researches retention requirements; drafts retention schedule language; meets with City staff to assist them in developing file plans.
8. Assists with the PARC historical collections; uses basic understanding of archival preservation, description and processing theories and practices to accession and process archival records collections; follows established guidelines for determining item-level needs, including whether records are archival or can be culled; recommends action for items not addressed in guidelines.
9. Provides customer support on routine issues in all areas of ARM, including assistance with TRIM technical support questions. May respond to questions coming through help desk services, via phone or email.
10. Plans and prepares educational exhibits to be displayed in a variety of venues, focusing on topics surrounding local history, archives and records management; assists with the planning, development and performance of outreach efforts; may be responsible for ongoing outreach activities.
11. Performs a variety of office and administrative duties for the PARC; completes money transactions; creates routine reports and statistics; answers operational questions.

## **MINIMUM QUALIFICATIONS**

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**Knowledge of:**

1. Knowledge of records management practices and procedures, including maintenance of official records and original documents, and retention, storage and destruction practices.
2. Knowledge of archives and records management theories and practices.
3. Research techniques, methods and procedures.
4. Knowledge of reference service practices and techniques.
5. Office practices and procedures.
6. Inventory and warehousing methods and techniques, including warehouse safety regulations and practices.

**Ability to:**

1. Communicate effectively verbally and in writing.
2. Learn and use a variety of computer software programs; accurately update complex databases and perform advanced searches.
3. Track and report activities using mathematical and statistical calculations.
4. Establish and maintain good working relationships with other employees, representatives of other agencies, public officials, and members of the general public.
5. Pass all phases of the physical capacities test.

**Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is college level education in library science, archives management or history with an archives certification and one year of records management experience; or an equivalent combination of training and experience. Experience in a public agency is preferred. Master's degree is preferred. Certification by the Academy of Certified Archivists is desired.

**PHYSICAL AND MENTAL DEMANDS**

Lift, pull, push and carry boxes that may weigh up to 40 pounds; move oversized and bulky materials including maps, rolled plans, archived displays and boxed archival supplies. 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.

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**Class History:**

Adopted: 07-01-02

Class created as a result of Nonrepresented Classification & Compensation Study, 2000-2002.

This class is composed of positions from the following class(es):

0450 RECORDS CENTER SPECIALIST Adopted:07-01-92

Revised:

June 2009 - Change Job Class number from 7302 to 30000542, due to system change.

12-3-14 – Updated duties. Changed title from Records Center Assistant. Increased compensation.