



## TOWN OF YOUNTVILLE JOB DESCRIPTION

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### **Records Coordinator**

Class specifications are intended to present a descriptive list of the range of typical duties performed by employees in the class. Specifications are not intended to reflect all duties performed by all employees in the class.

#### **GENERAL PURPOSE**

Under general direction of the Town Clerk, the Records Coordinator plans and coordinates the conduct of the Town's centralized records management program, including the receipt, storage, retrieval, and disposition of official Town records; works with records representatives from all departments; provides training; performs related duties as required. Provides administrative support to the Town Clerk.

#### **DISTINGUISHING CHARACTERISTICS**

This position is the records management position within the Town Clerk's office. It is distinguished from the next higher level class of Town Clerk as the Clerk is responsible for all functions and operations of the Town Clerk's Office, including the recording, preparation and maintenance of all Council legislative actions and proceedings; responsible for regulations pertaining to elections and campaign financing, Statements of Economic Interests; Public Records Act, Political Reform Act; Open Meeting law (Brown Act); and Records Management Guidelines.

The incumbent in this position provides staff support to the Town Clerk and Town Manager and must possess a high degree of initiative, independent judgment, understanding, organizational ability, and be responsible for handling sensitive information with diplomacy and discretion.

#### **DUTIES AND RESPONSIBILITIES**

*Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Maintain Laserfiche configuration details (e.g., update list values, user groups, etc.)
- Coordinate with Town Laserfiche users and with ECS to address and resolve issues, ensure software updates are tested and installed, and submit enhancement requests
- Assist Town staff with Laserfiche searching and help them learn how to search for themselves
- Work with Town departments, and with ECS, to develop and maintain Laserfiche forms, and related workflows, for staff processes (example: requesting time off) and public service processes (example: public record requests)
- Work with Town departments, and with ECS, to develop and maintain business process workflows (example: contract approvals)
- Monitor use of Laserfiche, following up to resolve any issues or need for additional training
- Coordinate records review and disposal events for Town staff and officials
- Generate record disposition eligibility reports from Laserfiche and coordinate disposal of records that have met retention in accordance with requirements
- Train new hires, contractors, part-time temporary employees and officials on Town's RIM program requirements
- Manage records of departing Town officials to they are transitioned to others or retained in accordance with requirements
- Develop standards for scanning projects to ensure consistent quality and capture of key metadata, and monitor scanning projects while in process
- Prepare and maintain instructions and documented guidelines for RIM program processes (example: properly disposing of Town documents)

May assist Town Clerk / Records Manager with one or more of the following functions, as assigned:

- Preparation and distribution of Town Council agenda packets; maintenance of official files and records of Council proceedings and actions; preparation, processing, distribution and posting of public notices, bulletins, and contracts; preparation of proclamations; ordinances, and resolutions.
- Coordination of Fair Political Practices Commission filing obligations required of Town Council members, commissioners, and designated employees.
- Coordination of the codification of the Municipal Code.
- May attend Town Council meetings and oversee follow-up pertaining to Town Council action taken at meetings.
- Receive, review, code and verify a variety of documents and records; determine appropriate categories of action to be initiated based upon the content of the documents and applicable laws and regulations; process documents through imaging software; maintain and ensure schedules and deadlines are met.
- Answer questions from Town staff regarding actions needing to be taken to organize and implement departmental document retention activities; assist operating departments in accordance with regulations specifying actions to be taken as a result of the information in documents, assist departments in updating departmental records retention schedules.
- Enter information into a computer system to initiate actions based on documents received and analyzed; apply proper codes or transactions resulting from the documents reviewed.
- Organize and schedule the purging of documents at Town Hall and located off-site in the cargo container.
- Copy, import, and verify documents from electronic or other media into the imaging software as necessary.
- Perform related duties as assigned.

### **MINIMUM QUALIFICATIONS**

#### **Knowledge of:**

Principles and practices of records management, including records retention laws and implementation of electronic document management and imaging systems; principles and practices of manual and computerized records and information management systems.

Modern office procedures, methods and computer equipment, including word processing, spreadsheet and records management software programs.

#### **Ability to:**

- Communicate clearly, concisely, and effectively with others, both orally and in writing; understand and follow oral and written instructions.
- Ability to operate a scanner and barcode equipment.
- Assist in preparing and distributing Town Council agenda and agenda packets via agenda management software.
- Procedures associated with the adoption of resolutions and ordinances and similar Council actions.
- Paraphrase Town Council minute actions and input into computerized records system; maintain a Town-wide computerized document library and subject file index.
- Index Council actions, contracts, agreements, deeds, easements, correspondence, and other official documents.
- Type, proofread and word process a variety of documents and forms including general correspondence, reports and memoranda; finalize resolutions, ordinances, and contracts approved by Council
- Administer the Municipal Code update process.
- Assist in preparing and distributing Town Council agenda and agenda packets via agenda management software.

- Become familiar with pertinent state, federal and local laws, codes and regulations, including the California Public Records Act, Brown Act and related legislation, practices and terminology associated with local codes and ordinances.

**Education and Experience:** Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

**Experience:**

A minimum of two (2) years of increasingly responsible experience performing specialized clerical duties. Formal training in records management is preferred. Public sector experience which includes working with Public Records Act requests and the Brown Act is desired.

**Education:**

High School graduate or equivalent and two (2) years of experience. Previous experience working for a public agency is desired.

AA/AS degree is desirable but not required.

**License or Certificate:** Willingness to travel to various locations within and outside the Town limits; and willingness to work flexible hours in order to administer programs, conduct research and make presentations.

**TOOLS AND EQUIPMENT USED**

Personal computer, including word processing, spreadsheet, web-site maintenance, PowerPoint presentation software, database, and project scheduling; motor vehicle; phone; cell phone.

**PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job in compliance with the American with Disabilities Act (ADA) requirements. On a case-by-case basis, reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Work is performed mostly in an office setting. Hand-eye coordination is necessary to operate computers and various pieces of office equipment.

While performing the duties of this job, the employee is occasionally required to stand; walk; use hands to finger, handle, feel, or operate objects, tools, or controls; and reach with hands and arms. The employee is occasionally required to sit; climb or balance; stoop, kneel, crouch, or crawl; talk or hear; and smell.

The employee must occasionally lift and/or move up to 35 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

**WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this position.

The noise level in the work environment is usually quiet to moderate, but can be noisy due to existing office configuration. Because the working environment is in a public administrative setting, the incumbent works with frequent deadlines, constant interruptions and, at times, impatient and irate customers.

**SELECTION GUIDELINES**

Formal application, rating of education and experience; oral interview and reference check; job related tests may be required.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or logical assignment to the position.

This position description does not constitute an employment agreement between the Town of Yountville and any employee and is subject to change by the Town as the needs of the Town and requirements of the position change, in accordance with applicable MOU provisions.

Approval: Brad Raulston Resolution No. 24-4330  
Town Manager

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