



TEXAS WOMAN'S
UNIVERSITY™

DATE ISSUED: 02/17
FLSA: Exempt
PTO: VCS

JOB DESCRIPTION

TITLE

Manager, Records Retention

JOB SUMMARY

The Records Retention Manager guides the ongoing operations of the University's records retention and management activities as part of the University Archives. The Records Retention Manager is responsible for carrying out the operational requirements that result from policies and procedures governing the management of university records that exist in both print and digital form. The position proactively supports a culture of high quality records management practices and services across the University ensuring that all work complies with established policies and procedures. The Records Retention Manager delivers organizational benefits and provides staff and units with support, training, and resources aligned with promoting best practices for managing and retaining university records. The Records Retention Manager will implement and support systems and practices that facilitate compliance with the requirements adopted by law under Texas Government code 13, 1.10 and 444.183, the Texas State Libraries and Archives Commission, Open Records Act, and Freedom of Information Act. This position fulfills duties associated with full cycle records retention services including the identification, control, production, distribution, storage, disposition, destruction, and retrieval of all institutional records. This position promotes positioning the University to comply with federal, state, and local requirements and other specifically related legislation. Work is performed under administrative direction and performance is based upon completion of assignments and results obtained. The performance evaluation is conducted through the performance evaluation system in accordance with the University Policies and Procedures.

ORGANIZATIONAL RELATIONSHIPS

Reports to: Director, Special Collections

Supervises: May supervise Student Assistants directly or indirectly

ESSENTIAL DUTIES - *May include, but not limited to the following:*

- Supports the daily operations of the records management area by providing full cycle records management services for the university's inactive records including, disposal services for confidential and sensitive records.
- Develops and implements procedures governing management of University records in print and digital formats.
- Consults with University offices to determine records management needs and to ensure compliance with requisite laws and institutional policies.
- Monitors the legal, regulatory, and best practices framework for records management and information and advises the University accordingly.
- Responsible for administrative and strategic support to the Records Management Unit of the University Archives that enables the University to achieve its objectives and meet obligations as mandated by the State.
- Promotes improved records management practices across the University as a whole.
- Maintains the TWU records retention and disposition schedules according to appropriate local, state, and federal laws and implements effective techniques for evaluating and improving the records and information management program.
- Monitors, applies, updates, interprets and manages the deposit, description, retrieval, transfer, and disposition of records and files according to the records retention schedule in collaboration with University departments.
- Ensures records retention and destruction activities are compliant with university policies.
- Develops informational materials and other print resources that describes and promotes Records Management Services to the University community.
- Implements a robust training program for staff and organizational units to support records management that meets state retention requirements.
- Responsible for reviewing records retention schedules and government record-keeping requirements to determine timetables for transferring active records to inactive status, archival storage, and/or disposition of obsolete or unnecessary records in consultation with departments.
- Maintains and disseminates information about the records management program via reports, web pages, and publications.
- Develops and maintains professional skills by participating in continuing education and professional development activities such as workshops, conferences, and seminars.
- Schedules with other university departments the transfer of materials to the archives and coordinates annual review prior to making arrangements for destruction.
- Manages the collection of departmental statistics including generating reports to evaluate and assess usage of materials and patron demographics.
- Analyzes statistical data and makes recommendations to streamline processes and enhance workflows.
- Works with the University Archives staff to ensure that materials of intrinsic historical value are transferred for preservation.
- Serves as an ambassador for the Libraries and its records management program across the University.

- Stays current with the trends and relevant research as identified among the professional literature.

ADDITIONAL DUTIES

- Digitizes and creates metadata for records that have intrinsic historical value to upload to the TWU Libraries Institutional Repository.
- Develops and implements appropriate information management tools to facilitate the organization and dissemination of information for the documentation which is within the mandate of the University Archives, using specialized areas of expertise.
- Provides specialized training and orientation sessions on records management to University staff.
- Complies with federal, state, and university policies for records management and retention;
- Provides consultation and training services for campus records custodians and records coordinators.
- Answers routine and complex questions regarding records retention schedules; resolves issues and completes service requests submitted via email, phone, and/or in-person.
- Responsible for reviewing records retention schedules and governmental record keeping requirements to determine timetables for transferring active records to inactive, archival storage, and/or for destroying obsolete or unnecessary records.
- Conducts research on retention schedules by consulting with external agencies and contacts Texas State Library and Archive Commission (TSLAC) to assure compliance with policies, procedures and practices. Works with university departments on determining appropriate retention period for file(s).
- Maintains Records Management database by updating existing information to include, but not limited to, university record information, destruction review lists, work order for deliveries/pickups, etc.
- Responsible for the timely disposal of records once they have met the assigned retention period.
- Tracks inquiries, service requests, time, consultations, number of boxes destroyed and/or for storage for reporting purposes.
- Recommends purchase of storage, retrieval, or disposal equipment based on knowledge of equipment capability and costs for the university archives to support the records management and retention program.
- Creates forms for university and departmental in Adobe Acrobat, Excel, and MS Word including Google.
- Provides reference and research support to TWU personnel and external patrons inquiring about the university history that can be found from its records and institutional data.
- Assists in the preparation of procedure manuals and documentation of records system.
- Organizes and maintains filing system and correspondence for the Records Management Program.
- Responsible for the purchases for the department with a university PCARD and submit monthly statements for approval on time.
- Represents the Records Management Unit and University Archives to external bodies across campus.

- Occasional overnight travel and evening and weekend hours required.
- Performs other duties as requested.

EDUCATION

Bachelor's degree in a related field such as Business or Public Administration/Policy, Information Technology, or Education and/or certified teacher. Master's degree in Records Management or Library Science from an ALA-accredited program or formal course work in archival theory, administration, practice, and methodology preferred.

EXPERIENCE

Four years of professional experience in a related field required. Experience with archives, preservation, and/or records management of digitized and born-digital materials preferred. Experience with electronic records management desired. Familiarity with ISO/TC 46/SC 11 records management standards desired. Experience developing training and learning modules. Experience delivering instruction, providing training face-to-face and virtually. Developing learning objectives and rubrics for measuring success desired. Assessment and continuous improvement experience a plus.

REQUIREMENT

Regular and reliable attendance at the University during regular scheduled days and work hours is an essential function of this position. Must possess a valid Texas driver's license. Occasionally overnight travel and flexibility to work weekends and evenings as required. Must maintain confidentiality of work related information and materials.

KNOWLEDGE, SKILLS, AND ABILITIES - The following are essential:

- Knowledge of Texas State Libraries and Archives Commission guidelines, policies, procedural requirements, and retention schedules.
- Knowledge of state and federal laws, regulations, methods, and techniques associated with records management including Texas Government code 13, 1.10 and 444.183.
- Knowledge of the Open Records Act, Freedom of Information Act, Health Insurance Portability and Accountability Act, Family Educational Rights and Privacy Act, and other regional, state, and national privacy laws that may impact retention practices including destruction.
- Knowledge of practices and standards adopted by the National Archives and Records Administration.
- Knowledge of archival practices and records maintenance skills.
- Knowledge of electronic records management and digital preservation theory principles, practices, and methodology.

- Exceptional interpersonal communication, presentation, and public speaking skills and the ability to effectively communicate orally and in writing.
- Advanced research skills using electronic and printed sources.
- Proficient in Microsoft Office products including Access and Excel.
- Ability to champion the benefits of a records management program.
- Ability to work creatively, collaboratively, and effectively as a team member and independently to promote teamwork within the organization and to maintain effective work relationships with a wide range of constituencies in a diverse community.
- Ability to work flexibly and adapt to a fast-paced and changing environment.
- Attention to detail, accuracy, and follow through.
- Ability to utilize computer technology to access, gather, compile, examine, arrange, and analyze data and generate reports and communicate with others.
- Ability to organize work effectively, conceptualize and prioritize objectives and exercise independent judgment based on an understanding of organizational policies and activities.
- Ability to interpret, adapt, apply, and integrate resources, policies, and information for the determination of procedures, solutions, and other outcomes.
- Ability to deliver a positive customer service experience.
- Ability to use digital cameras.
- Ability to implement short and long range goals.
- Ability to lead and train student assistants and to organize and schedule work assignments.
- Ability to foster a cooperative work environment.
- Ability to use a personal computer and other office equipment, including related university software and email.

PHYSICAL DEMANDS

The physical demands described in the Essential Duties and below are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties.

The employee may be required to travel. The employee must have the ability to occasionally lift and/or move up to 50 pounds.

WORK ENVIRONMENT

All employees are responsible for maintaining an environment that is free from discrimination, intimidation, harassment, including sexual harassment. Work is normally performed in a typical interior work environment.

SAFETY

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TWU promotes a safe working environment. Employees are responsible for completing assigned tasks safely and efficiently, and supervisors are responsible for creating and maintaining a safe work environment. Employees must report any unsafe work conditions or practices, as well as any near-miss incidents, to their supervisor and Risk Management. Supervisors and employees should ensure that injury/accident reports are submitted to the Office of Human Resources and Risk Management within 24 hours of the incident.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Employee Signature: _____ **Date:** _____

Employee Printed Name: _____

Texas Woman's University strives to provide an educational environment that affirms the rights and dignity of each individual, fosters diversity, and encourages a respect for the differences among persons. Discrimination or harassment of any kind is considered inappropriate.

Texas Woman's University is committed to equal opportunity in employment and education and does not discriminate on the basis of race, color, religion, gender, sex, sexual orientation, ethnic origin, age, veteran's status, or against qualified disabled persons.

All positions at Texas Woman's University are deemed security sensitive requiring background checks.