

Department of Administration  
Division of Enterprise Operations  
Bureau of Enterprise Fleet  
Records Management, Document Sales and Distribution and,  
Mail Transportation Services Section

Records/Forms Management Specialist  
Position Number: 307517  
December 28, 2015

**Position Summary:**

Under the general supervision of the section chief, this position serves as a lead worker to meet the overall enterprise records management obligations of the Department of Administration (DOA) including State Records Center (SRC) inventory operations, retention disposition responsibilities, policies and procedures, the activities of the Public Records Board (PRB) with state agencies and local units of government and various other activities by local government and state agency records management programs. The position is located at the State Records Center, 4622 University Avenue, Madison, WI 53705.

**Goals and Worker Activities:**

**25% A. Enterprise Records Management: Guide enterprise records management responsibilities to state agencies and local units of government to meet DOA's statutory obligations.**

A1. Prepare reports and other materials for enterprise records management consultations with state agencies and local units of government to include Records Series Reports, record retention disposition authorizations (RDA) reports, records inventory reports, General Records Schedules and other data and reports as needed. Actively participate in consultations, work on follow up activities directly with the agency through to resolution. Analyze consultation outcomes for trending purposes.

A2. Regularly communicate with state agencies and local units of government on DOA's overall enterprise records management responsibilities including the PRB's regular communications with state agency deputy secretaries and the SRC's frequent communication with records officers on enterprise records management matters.

A3. Proactively maintain subject-matter-expert knowledge of the SRC fee schedule. Work with the division budget office to set rates. Announce rates annually to state agencies. Answer questions from state agency customers on the fee structure and rate changes.

A4. Prepare reports, data and materials for training and education sessions at state agencies and local units of government. Co-facilitate sessions as a subject-matter expert, work on follow-up activities directly with the agency through to resolution. Analyze training and education outcomes for trending purposes.

A5. Facilitate tours of the SRC for state agency and local government employees. Prepare tour materials specific to each agency including inventory statistics and other data on stored records, procedures and policies. Answer all questions. Respond directly to agencies on all follow up activities.

A6. Develop brochures and other promotional materials for state agencies and local units of government to increase awareness of DOA's enterprise wide records management responsibilities and SRC procedures, services and program benefits.

A7. Work with the section chief and program staff on problem resolution including issues identified by state agency records officers and records inventory staff.

A8. Working with the section chief as directed, research, analyze, assemble or obtain information for special projects to fulfill DOA's enterprise records management responsibilities.

A9. Participate on committees and perform committee work as requested to help meet DOA's records management responsibilities.

**20% B. Public Records Board: Coordinate efforts of DOA to meet its enterprise responsibilities to the PRB.**

B1. Proactively maintain subject matter expertise of all policies and procedures prescribed by statute to the PRB for the management of records at the state agency and local unit of government level.

B2. Provide subject-matter expertise of records management Wis. Stats. §§16.61-16.62 to state agency and local government records managers, coordinators and associated staff.

B3. With the Executive Secretary of the PRB, co-facilitate the quarterly Records Officers Council meetings. Meet all required obligations of Wisconsin Open Meetings Law to announce the meetings across the enterprise and make subsequent meeting minutes available to the public. Actively participate in meetings, work on follow up activities directly with records officers through to resolution. Analyze Council activities and outcomes for trending purposes.

B4. Prepare for quarterly PRB meetings. Prepare materials for PRB action. Meet all required obligations of Wisconsin Open Meetings Law to announce the meetings across the enterprise and make subsequent meeting minutes available to the public. Participate in meetings and work on follow up activities directly with PRB members through to resolution. Analyze PRB activities and outcomes for trending purposes.

B5. Prepare for quarterly Records Management Committee (RMC) meetings. Prepare materials for RMC action. Meet all required obligations of Wisconsin Open Meetings Law to announce the meetings across the enterprise and make subsequent meeting minutes available to the public. Participate in meetings and work on follow up activities directly with RMC members through to resolution. Analyze RMC activities and outcomes for trending purposes.

**20% C. State Records Center Enterprise Records Inventory Management:**

C1. Proactively maintain subject matter expert knowledge of SRC policies and procedures for the storage and life cycle management of over 500,000 boxes and files of records. Interpret, understand and communicate SRC policies and procedures for records management staff in state agencies and local units of government. Make recommendations for program and process efficiencies.

C2. Participate in weekly briefings with the supervisor regarding work rotations, special projects or unique service requests from state agencies and local governments.

C3. Plan, assign, and guide the activities of six (6) Inventory Control Coordinators. Ensure the weekly rotation schedule is followed but modified as necessary for short-staffing situations and problem resolution.

C4. Train new Inventory Control Coordinators on inventory management, use of bar code scanners, use of warehouse equipment such as pallet jacks, carts and ladders, learning large truck driving skills, the locations and particulars of over 80 state agency and university dock locations and tutoring to obtain a Commercial Driver's License.

C5. Initiate and prepare the semi-annual destruction/transfer cycle of stored records having met their expiration dates. Run reports which identify records having met their full life cycle, send agency-specific reports to the appropriate records officers to obtain approvals prior to destruction. Ensure records are destroyed in a confidential manner.

C6. Prepare the monthly storage report. Pull data together from service requests and enter into Versatile. Identify each governmental agency's use of storage at the SRC at the end of each month. Perform quality control of the data to verify its accuracy.

C7. Prepare the monthly General Services Billing report to charge all customers via use codes for services rendered by the SRC. Stay abreast of use code changes and update agency files as necessary.

C8. Schedule routine preventative and emergency truck and equipment maintenance. Arrange for delivery or pickup of equipment or truck to fit best with the operational needs of the SRC. Track the turnaround time and follow up with the vendor as appropriate. Organize and maintain records of all activities in central files for easy access by the supervisor or section chief.

**20% D. State Records Center Enterprise Records Management System Management (Versatile) and Website:**

D1. Maintain daily, hands-on, in depth, fully functional knowledge of the operational use of Versatile, the records management software program or if replaced, the equivalent technology, to manage records inventory on shelving as well as the chain-of-custody for inventory entering or leaving the site. Run standard and ad hoc inventory related reports as needed and provide leadership with analysis.

D2. Maintain daily, hands-on, in depth, fully functional knowledge of the operational use of Versatile, the records management software program or if replaced, the equivalent technology, to meet DOA's overall records obligations for PRB retention policies for state agencies and local units of government.

D3. Make authorized changes to inventory in Versatile as requested by records officers in governmental agencies, add, delete, modify and maintain RDAs in the system for governmental agencies.

D4. Setup users in the Versatile system as requested by authorized agency records officers. Ensure secure access to records data by verifying the authority of the requesting agency. Delete and modify user setups as soon as notified by the agency to

enforce system security measures.

D5. Maintain accurate information for over 8,900 RDAs in the Versatile system. Make RDA changes, additions and deletions pursuant to authorized requests by agencies. Pursuant to Public Records Law, maintain the original, signed and fully executed original RDAs for its full retention period.

D6. Train SRC staff on Versatile or its equivalent to maintain their knowledge to perform the daily operational tasks of the SRC.

D7. Prepare materials for Versatile training and education sessions at state agencies and local units of government. Co-facilitate sessions. Work on follow up activities directly with records managers through to resolution. Analyze activities and outcomes for trending purposes.

D8. Create and run reports for records management staff in state agencies and local units of government to better manage their agency's records management policies and procedures. Train records managers on how to generate their own reports.

D9. Respond to state agency records officer and coordinator questions on the use of Versatile. Train agency staff on effectively using the system to locate their agency's information.

D10. Maintain the SRC website to accurately reflect all policies, procedures and rates. Make changes as needed to the hours of operations, personnel, forms, fact sheets and other information necessary for records managers at state agencies and local units of government.

**10% E. Forms Management:**

E1. Develop new and revise existing DOA/SRC records management forms for use by all state and local government agencies. Work with inter-agency committees of records managers to assure their maximum operational effectiveness for agencies and the SRC. Publish all forms to the SRC website.

E2. Develop new and revise existing PRB forms which establish records management policy in the State of Wisconsin for all governmental agencies. On behalf of the PRB, work with inter-agency committees, the PRB Executive Secretary and DOA legal counsel to create and revise forms in compliance with the PRB's statutory authority and DOA's records management obligations. Publish all forms to the PRB website.

E3. Direct activities associated with the general records schedules utilized by state agency and local government records managers. Lead records managers through ongoing pending and completed revisions to the general records schedules. Assess general records schedule RDA change requests from agencies, add to the placeholder spreadsheet as appropriate, work to submit the change to the RMC and PRB for approval. Upon approval, make the official changes to the general records schedules and post the updated versions to the PRB website. Assist with the communication of the changes to state agencies on behalf of the PRB.

E4. Submit all new forms and changes to existing forms to the DOA Forms Officer. Work with him/her to formalize the forms, answer questions on content and formatting.

E5. Notify all state agency and local units of government on new or updated forms.  
Respond to inquiries on forms.

**5% F. General:**

F1. Backup all records personnel at the SRC during peak periods, absences or short-staffing situations.

F2. In concert with the State Bureau of Procurement, pull information and data together to assist with bid/proposal preparation and release as requested.

F3. Prepare request-to-staff materials as requested.

F4. Undertake special research projects as needed or assigned.

F5. Perform other duties as assigned.

**KNOWLEDGE, SKILLS AND ABILITIES:**

1. Highly effective inter-personal skills.
2. Extensive knowledge of inventory management.
3. Extensive knowledge of the Versatile or similar records management application.
4. Extensive knowledge of records management principles, practices, processes and procedures.
5. Ability to exercise sound judgment.
6. Creative problem solving skills.
7. Ability to become proficient in the use of Microsoft Word, Excel, Access and PowerPoint.
8. Excellent verbal and written communication skills.
9. Ability to become proficient in the maintenance of websites.

**Special Requirements:**

- Ability to maintain a current Commercial Driver's License (CDL) with air brakes
- Ability to comply with random drug and alcohol testing
- Ability to meet DOA Fleet driving standards
- Ability to utilize pallet jacks, carts and ladders or similar throughout the day
- Ability to lift and carry up to 50 pounds; bend, stoop, twist, pull and push; climb up and down ladders; and reach overhead to pull and place boxes weighing up to 50 pounds, with or without accommodation