



CLASSIFICATION NO. 146

Established: 7/14

Revised: 2/19, 8/25

FLSA: Non-Exempt

EEO: 6

TRANSPORTATION AND DEVELOPMENT DOCUMENT SPECIALIST

CLASS CHARACTERISTICS

Under general supervision, to perform project management and coordination of department-wide document retention functions within the Department of Transportation and Development (DTD) in compliance with department-specific legal requirements and records retention guidelines; to serve as the department's subject matter expert and primary technical advisor on document management systems; to plan, develop, recommend, and implement department policies, practices, and procedures related to records compliance and system integration; to provide technical guidance and quality assurance to ensure accuracy, completeness and legal compliance of scanned and archived documents; to process public records requests; to train and advise department staff and management on proper records handling, retention, and retrieval methods; to lead the work of assigned staff who prepare and scan documents for archiving; and to perform other work as required.

DISTINGUISHING CHARACTERISTICS

Clackamas County's Department of Transportation and Development (DTD) provides programs and services to County residents and businesses through multiple service areas including, Transportation Services, Development Services, Community Services, Visioning Services and Administrative Services.

The Transportation and Development Document Specialist is a single-incumbent classification that provides advanced technical expertise and project management for department-wide document imaging, electronic content management, storage, archiving, and retrieval systems. The position is responsible for planning, coordinating, and implementing complex records management projects across multiple divisions; developing, implement, and enforce specialized retention policies in compliance with federal, state, and local regulations; and integrating technology solutions to improve accuracy, efficiency, and compliance.

The incumbent is the primary point of contact to the Technology Services (TS) Department, Records Management, external vendors, and County Counsel regarding department records research and public records requests. The incumbent leads cross-division initiatives, analyzes and redesigns records workflows, identifies automation opportunities, and ensures successful implementation of technology and process improvements. The incumbent also provides technical guidance and lead direction to staff responsible for document preparation, scanning, and quality control, ensuring adherence to industry standards and system requirements.

The Transportation and Development Document Specialist differs from the Permits Technician, Senior classification which performs project management and systems administration for permitting and plan review software. It further differs from classifications in the Records Management Division of the County Clerk's Office which focus on countywide records management, quality control, storage operations, and applying standardized retention policies.

The Transportation and Development Document Specialist manages DTD-specific records compliance, develops specialized records management policies, leads department-wide records projects, and serves as the primary technical advisor for DTD's document management systems. The classification differs from the Management Analyst 1 which performs analytical, budgetary, and administrative work to support programs or divisions, with responsibilities centered on financial analysis and operational process improvement rather than specialized records management.

TYPICAL TASKS

Duties may include but are not limited to the following:

1. Serves as the department subject matter expert (SME) on the document retention software; works with Technology Services (TS) and third-party vendors to ensure document retention strategies are compatible with existing computer systems and DTD specific regulations and requirements; tests software upgrades and provides feedback to TS and vendors; monitors and reviews computer systems; serves as departmental project manager for software system upgrades and enhancements.
2. Works with management and staff to utilize and maintain software to meet records management requirements in accordance with County and DTD specific legal requirements; researches new methods and procedures related to document retention and archiving to ensure consistency and maximize efficiency and effectiveness of records archival and retrieval as it relates to all DTD Division requirements; serves as departmental project manager on efforts related to records scanning, retention and archiving; performs periodic reviews of records management systems and tools; researches and recommends changes and enhancements to management.
3. Performs quality control audits of scanned finished products processed by various departmental staff in accordance with program and funding specific legal requirements; reviews records for completeness, accuracy and appropriate indexing; examines documents for poor reproduction and viewing properties, and ensures corrections are made; identifies and resolves discrepancies; reviews records retention for the destruction approval process; reports and provides recommendations on errors or discrepancies to the appropriate staff and management; leads the work of assigned staff to ensure errors and discrepancies are addressed.
4. Monitors and reports on changes in state and federal requirements, rules and regulations and determines impact on department's records retention schedules; provides recommendations to comply with those changes; assists in informing staff of changes to records management policies, procedures and laws; communicates with the County's Records Management Division for clarification or interpretation of OARS, statutes and practices to ensure compliance or correct application of retention policies.
5. Researches and responds to Public Records Requests and other external requests, including consultation with department staff and County Counsel to ensure program and funding specific legal requirements are considered, the Records Management Division, Technology Services, and other departments as appropriate; maintains a record tracking system and forwards records to appropriate location.

6. Trains department staff and management on software applications and requirements, document preparation, archiving, and retention tasks, including appropriate use of scanning equipment, indexing codes, and record storage and retrieval; responds to user questions and problems related to document management, archiving, and software; schedules staff for training with Records Management Division.
7. Prepares, scans and indexes a wide variety of departmental documents; imports scanned documents into document retention software; prepares and sends departmental retention documents to Records Management Division for archival scanning and retention; ensures all documents to be scanned are of archival quality; serves as a subject matter expert for departmental staff and management in determining and developing document scanning and retention strategies; and provides information and assistance to department staff and management regarding document research and retrieval.
8. Researches and develops practices and procedures for departmental records to improve quality, content and security; develops indexing criteria, instructions and documentation; collaborates with programs for development of indexing criteria; ensures procedures are clear and concise, and makes recommendations for procedural changes; assists in maintaining departmental records procedure manuals.
9. On behalf of DTD, liaisons between Records Management and the department; coordinates changes from Records Management, sends and retrieves documents from Records Management, develops and maintains strong working partnership with Records Management staff.
10. Leads the work of assigned staff; tracks progress of work assignments; coordinates and directs the work of private consultants for services such as provision of document management software, scanning, and document retention.

REQUIRED KNOWLEDGE AND SKILLS

Thorough Knowledge of: Records management and retention practices and principles; database management; computers and software applications, including database programs, scanner operation.

Working Knowledge of: Principles and practices of project management; county codes, rules, and regulations; Federal and State statutes, regulations and rules governing records retention and records management; database management; record storage technologies; data processing capabilities and equipment; document preparation, reproduction of public records, scanning and quality control processes, including data export/import and electronic document management systems; organizing, categorizing, and indexing documents within an electronic document management system; researching and locating information in databases; digital imaging systems, standards and practices; training method techniques; training other employees in records managements practices and principles, and organizing work for oneself and other records staff; leading the work of other staff including making work assignments, evaluating work quality and providing productive feedback; practices and procedures for document storage including alphabetical, numeric, terminal digit and chronological filing systems; English grammar and composition; basic preservation, processing, reproduction and maintenance of public records; general principals of document preservation of paper, microfilm and electronic records.

Skill to: Research and analyze information and prepare clear and concise procedures, reports and recommendations; efficiently and effectively operate computer equipment, including scanners and various software applications; appraise department records; recommend and enact retention and storage options; coordinate the records management strategy for the department; maintain department's compliance with state and federal requirements, laws, rules and statutes regarding imaging and records retention; provide guidance to department management and staff; review and recommend appropriate technologies for department's records management and storage needs; manage projects including implementation and testing of new and existing records management software; independently, accurately and effectively perform assigned duties; communicate effectively, both orally and in writing; read, interpret and explain department policies and procedures; coordinate, train and oversee scanning work performed by various department staff; establish and maintain effective working relationships with assigned staff, co-workers and other County department staff and the public; evaluate quality of documents; correct equipment or other issues resulting in poor quality of scanned products; arrange and search records alphabetically, numerically and chronologically using several database fields; organize and categorize documents within an electronic storage system; research and locate information in the databases; create practices and procedures for records management in the department.

WORKING CONDITIONS:

Duties require occasional to frequent sitting, standing, walking, squatting, kneeling, bending, twisting, reaching forward and overhead, grasping, fine motor control and climbing. The ability to lift, push and pull 30 pounds. Duties also involve occasional exposure to dust, working at heights (stepstools), fumes and exhaust.

MINIMUM QUALIFICATIONS

Minimum qualifications are used as a guide for establishing the minimum experience, education, licensure, and/or certifications required for employment in the classification. The following minimum qualifications are established for this classification. Additional minimum qualifications and special conditions may apply to a specific position within this classification and will be stated on the job announcement.

Experience: A minimum of three (3) years of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

Licenses/Certifications: None required.

PRE-EMPLOYMENT REQUIREMENTS

Employment is contingent upon passing a post-offer physical assessment. Accommodation requests will be reviewed on an individual basis in compliance with State and Federal legislation