

Role Profile

Part A - Grade & Structure Information

Job Family Code	6BF	Role Title	Records Management Assistant
Grade	PS6	Reports to (role title)	Information Governance Specialist
		Directorate/School	Resources
JE Band	192-227	Service/Department	Information Governance
		Date Role Profile was created	Jul-25

Part B - Job Family Description

The below profile describes the general nature of work performed at this level as set out in the job family. It is not intended to be a detailed list of all duties and responsibilities which may be required. The role will be further defined by annual objectives, which will be developed with the role holder. The Council reserves the right to review and amend the job families on a regular basis.

Role Purpose including key outputs	<p>The Record Management Assistant ensures the efficient and secure handling, storage, retrieval and destruction of records across the council ensuring adherence to records policies and retention schedules across the council. They provide advice and guidance to staff on document preparation and ensuring compliance with organisational policies and procedures. This involves preparing files for archiving, managing the supply of boxes, updating systems, and coordinating the safe transit of record as required to and from offsite storage facilities. They oversee and manage the destruction of archived records working closely with services to process the large volume of stored records with no documented review or destruction schedule.</p> <p>Key accountabilities</p> <ol style="list-style-type: none"> 1. Ensure all files and records are packed securely and accurately in accordance with the requirements of the offsite storage contract to ensure the integrity and security of records. This includes the collection, transport and delivery of files from and to various locations around the county as required to ensure prompt delivery of timescales are achieved. 2. Request and manage the supply of boxes needed for archiving, ensuring they are appropriately labelled and prepared for storage to ensure efficient and organised archiving. 3. Update relevant systems to reflect the status and location of records, ensuring accurate tracking and retrieval to ensure records are easily accessible when needed including the secure movement of archived files to and from off-site storage 4. Manage and oversee the review and destruction of hardcopy records, monitoring the end-to-end destruction process to ensure that destruction certificates are obtained from the off-site storage provider, subsequently filed, and sent to the relevant service. Review and make informed judgments regarding the appropriate course of action for archived records with no documented review or destruction schedule, identifying the appropriate course of action and escalating high-risk records for review by the Records Specialist. 5. Confidently engage with the off-site storage provider, services across the Council and staff at all levels to provide timely and accurate information and support, building credible and effective relationships that enable effective communication and where needed, challenge. 6. Provide advice and guidance to staff on the practical aspects of document preparation, storage, and retrieval and destruction to ensure compliance with organisational policies and procedures and to facilitate efficient and secure record management. 7. Ensure all record management activities comply with organisational policies and procedures, maintaining high standards of quality and accuracy to ensure compliance and reliability. 8. Maintain a high level of organisation and attention to detail in all tasks, using a methodical approach to information gathering, recording, and reporting to ensure the integrity and accuracy of records.
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Work Context	<p>This is a newly established Information Governance (IG) function that brings together IG teams from across the council.</p> <p>The Record Management Assistant works under the guidance and supervision of the Records Manager, ensuring the efficient and secure handling of records. The role involves preparing files for storage and archiving including scanning, requesting and managing boxes, updating systems, and coordinating the safe transit of records to and from offsite storage facilities. They will manage the end to end process of review and destruction of records as part of the active review to implement the destruction process in compliance with the County Council's Retention Schedules.</p> <p>They travel to various sites to collect, transport, and deliver archived files, ensuring prompt delivery timescales are achieved. This role requires methodical organisation, attention to detail, and the ability to coordinate and organise large amounts of information securely.</p> <p>They work closely with other members of the Records Management team and with the other members of the IG Team and may be involved in project teams to support the effective management and archiving of information associated with office moves and closures. They will interact with staff at different office and storage locations across Surrey, providing advice on the correct preparation and management of the archival and retrieval processes, ensuring compliance with organisational policies and procedures.</p> <p>The role also involves physical effort and manual handling, requiring travel as needed and work in a range of environments.</p> <p>Record Management Assistants require a solid understanding of the administrative processes associated with the correct management of records in the council, as well as strong communication skills. They have a robust working knowledge of relevant policy and practice with the ability to review information against the policies and schedules and make an informed decision about an appropriate course of action. This includes exercising judgement on when to escalate high risk decisions to the Records Specialist for review. The role involves a mix of routine, practical tasks, administrative and organisational activities, as well as the application of knowledge to a range of situations to determine an appropriate course of action to ensure records are stored and archived correctly, systems tracking the movement of records are updated and maintained, records are easily retrievable as needed, and destroyed appropriately in line with any relevant policy or legal requirements.</p> <p>Record Management Assistants are task-oriented, managing high volumes of requests in accordance with established processes as they develop their confidence and knowledge to take on more complex work.</p>
Line management responsibility if applicable	None
Budget responsibility if applicable	None
Representative Accountabilities Typical accountabilities in roles at this level in this job family	<p>Analysis, Reporting & Documentation</p> <ul style="list-style-type: none"> • Provide and manipulate data for statistical purposes and run and present standard reports. • Prepare and despatch a range of correspondence/documents to facilitate efficient response to enquiries and timely conclusion of any process connected with the defined area of activity. <p>Service Delivery</p> <ul style="list-style-type: none"> • Deliver a range of administrative and/or customer/consultancy services in support of existing systems or processes to agreed standards, to maximise service quality and continuity. • Receive and respond to everyday enquiries from colleagues and customers to provide a timely, courteous and effective service. <p>Planning & Organising</p> <ul style="list-style-type: none"> • Support a group of senior staff/service team, ensuring confidentiality, and assisting in the effective organisation of internal/external meetings and activities to support a high standard of office organisation. • Plan and prioritise own week-to-week work activities, to ensure operational efficiency. Refer to more senior colleagues for prioritisation of non-standard work. <p>Finance/Resource Management</p> <ul style="list-style-type: none"> • Follow established ordering procedures to ensure adequate resources are available. <p>Work with others</p> <ul style="list-style-type: none"> • Maintain a network of contacts, knowing who to liaise with on key issues to report on and resolve issues. • Communicate and liaise with service users and/or external contacts, usually through established routine connections as own section of work requires. <p>People Management</p> <ul style="list-style-type: none"> • Guide junior staff in duties to facilitate their development and ensure routines observed.

Education, Knowledge, Skills & Abilities, Experience and Personal Characteristics	<ul style="list-style-type: none"> • Minimum 5 GCSEs at Grade C or above, or equivalent, or able to evidence ability at an equivalent level. • Relevant HR, management, communication, business administration or financial qualification to NVQ Level 2/3, or able to evidence knowledge/understanding of relevant discipline. • Familiar with one or more of the specific processes used in the relevant discipline. • Ability to apply relevant health and safety, equality and diversity, and other County/Service policies and procedures. • Competent in a range of IT tools. • Ability to work with others to achieve objectives and improve customer service. • Good written and oral communication skills with the ability to build sound relationships with customers. • Good administrative /organisational and analytical skills. • Ability to prioritise and plan own workload in the context of conflicting priorities and work on own initiative. • A methodical approach to information gathering, recording and reporting. • Previous relevant work experience. • Experience of maintaining business processes and systems. • Ability to guide and support less experienced or more junior colleagues (for some roles).
Details of the specific qualifications and/or experience if required for the role in line with the above description	<p>Skills</p> <ul style="list-style-type: none"> • Good understanding of processes related to the correct management and destruction of records within the council • High level of accuracy and attention to detail in all tasks to ensure the integrity and security of records • Strong organisational skills to manage large volumes of information and ensure efficient and organised archiving • Effective collaboration and communication skills to provide advice, guidance and challenge to staff • Ability to perform manual handling and physically demanding work, including lifting and transporting files and boxes • Ability to interpret policy and practice in problem solving to make sound decisions <p>Knowledge</p> <ul style="list-style-type: none"> • Experience using MS Office and database management systems to update and maintain records. • Understanding of the need for confidentiality and compliance with organisational policies and procedures. • Working knowledge of the application of records policies and retention schedules across the organisation. <p>Experience</p> <ul style="list-style-type: none"> • Willingness to undertake continuous professional development to enhance skills and knowledge. • Hold a full driving licence and be willing and able to travel within the county to various office and storage locations. <p>Other requirements DBS check required</p>
Role Summary	<p>Roles at this level provide a business support service as part of a specific service or service team. They will carry out a range of administrative tasks using knowledge of general office routines and procedures, together with a broad understanding of the department and how the tasks directly support the service or service team. The work is within established processes and procedures and while it may not be subject to direct supervision, guidance is readily available. They will be expected to organise their own workload and set their own priorities within short, e.g. day-to-day or week-to-week timescales, usually reacting to clear deadlines or processes. They support more senior staff by executing the detailed processes in specific aspects of business, financial, communication, facilities and/or HR administration and will be fully versed in all the procedures of their specialism. They may be involved in guiding the work of more junior staff. For some roles, customer service may be the predominant feature, e.g. dealing with a variety of clients in relation to a department's activities. Others may support a group of more senior staff with some of the more routine duties and ensure matters are dealt with appropriately when they are out of the office.</p>
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