

I. DESCRIPTION OF WORK

Positions in this banded class perform specialized archival and records management duties pertaining to appraisal, accessioning, disposition, and providing access to public and private records. Duties may include the appraisal, arrangement, preservation and description of public and private records and historical collections in all formats; producing finding aids in both published and web-based formats in order to promote access to collections; developing record retention and disposition schedules; providing reference and access services; responding to historical and reference questions asked by state and local government agency staff and the general public; and answering questions posed by researchers concerning records and record keeping functions, historical events, and research and genealogical techniques. Positions require knowledge and application of relevant standards, policies, procedures, as well as standard and specialized technologies and applications. They provide consulting services to clients including employees and officials of state and local government agencies and members of the University System. They advise clients in the creation of policies, procedures, rules, regulations, and standards for the creation, maintenance, utilization, retention, preservation, and disposition of records in all formats. They provide educational and outreach support by presenting lectures and workshops to state and local government agencies, students, and historical, civic, educational, and professional organizations.

II. ROLE DESCRIPTIONS BY COMPETENCY LEVEL

Contributing	Journey	Advanced
<p>Positions at this level apply basic archival and records management techniques including appraisal, arrangement, and describing of records and documents. They provide basic reference and consultative services, conduct basic research using primary source materials, assist patrons by providing routine information and resources, and assist in collecting information. Work may include consulting with state agencies, institutions and local governments, including evaluation of existing processes and systems. Work involves public contact with a wide variety of clients. Work may include providing administrative support such as performing purchasing and budgetary functions.</p>	<p>Positions at this level perform professional level archival and records management work including appraising, accessioning, arranging and describing, referencing, and preserving records documents. They may have one or more areas of specialty. Work may include consulting with state agencies, institutions and local governments, including proposing new, revised, and/or improved processes and systems. Work requires extensive public contact with a wide variety of clients. Work may include organizing and reviewing the work of others.</p>	<p>Positions at this level have the following responsibilities: appraising, acquiring, accessioning, arranging and describing, referencing, and preserving specialized or complex collections and record groups. They participate in collection management by contacting potential donors, negotiating with donors for collections, and assessing the historical value of collections. Duties may include supervision of others, including overseeing and directing staff activities. Positions at this level provide outreach to the public through speaking engagements to historical, civic, and professional organizations.</p>

III. COMPETENCIES

Competency	Definition
Knowledge – Professional and Technical	Possession of a designated level of professional skill and/or knowledge in archives and records management and the ability to keep current with developments and trends in area(s) of expertise, usually acquired through post-secondary education. Possession of a designated level of technical skill in archives and records management systems and technology and the ability to keep current with developments and trends.
Archival and Records Management	Ability to apply practices and techniques of archival and records management to assigned area of responsibility including appraisal, accessioning, disposition, arranging, and describing public and private records and collections; ability to promote access to records and collections by all users. Ability to organize and manage a large volume of material.
Client/Customer Services	Ability to develop and maintain effective relationships with clients or customers by listening to the client/patron and understanding and responding to identified needs. Ability to collect information, conduct searches, investigate and guide client/patron to appropriate sources for help or information.
Communication and Interpersonal Skills	Ability to provide information to individuals or groups; ability to deliver presentations suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely to groups or individuals either verbally or in writing to ensure that they understand the information and the message. Ability to listen and respond appropriately to others. Ability to develop and maintain effective working relationships in order to support effective communication and teamwork. Ability to build and use collaborative relationships to facilitate the accomplishment of program goals; ability to seek and identify opportunities to build strategic relationships.
Training	Ability to design, develop, and deliver training and workshops to staff, researchers, local and state government agencies, and the general public.
Human Resources Management	Ability to establish work rules and acceptable levels of quality and quantity of work; ability to review work and measure performance of others. Ability to recruit, select, develop, counsel, discipline, and evaluate performance of employees to retain a diverse workforce; ability to administer and ensure compliance with human resources policies and procedures. Ability to identify skills and abilities to fulfill current or future job or role responsibilities more effectively. Ability to plan and support the development of others.
Planning and Organizing Work/ Administrative Support	Ability to develop plans to accomplish work operations and objectives; ability to arrange and assign work to use resources efficiently. Ability to provide administrative support for the business operations by performing purchasing and/or budgetary functions.

Note: Not all competencies apply to every position/employee; evaluate only those that apply. Competency statements are progressive.

IV. COMPETENCY STATEMENTS BY LEVEL

Knowledge – Professional and Technical

Possession of a designated level of professional skill and/or knowledge in archives and records management and the ability to keep current with developments and trends in area(s) of expertise, usually acquired through post-secondary education. Possession of a designated level of technical skill in archives and records management systems and technology and the ability to keep current with developments and trends.

Contributing	Journey	Advanced
<p>Basic knowledge of the principles and practices of archival and/or records management. Basic knowledge of and ability to apply metadata standards.</p> <p>Basic knowledge of and ability to conduct research using primary and secondary archival, records management and legal sources.</p> <p>Basic knowledge of historical and current storage methods, preservation, and the current and long-range impact of all types of storage systems.</p> <p>Basic knowledge of current systems, technologies and procedures used in the provision of information services; concepts of fair use, copyright law, state and federal public records law, and intellectual property rights.</p> <p>Basic knowledge of multiple, complex sets of standards, policies and procedures. Interprets multiple, complex sets of standards, policies and procedures.</p> <p>Ability to stay informed of current developments, trends, and technologies in archival and records management.</p> <p>Basic knowledge of the organization and operation of state and local governments. Applies basic knowledge of North Carolina history, its people, and places and how government has evolved. May require knowledge of genealogy practices and standards.</p>	<p>Full knowledge of the principles and practices of archival and records management. Full knowledge of and ability to apply metadata standards.</p> <p>Full knowledge of and ability to conduct research using primary and secondary sources.</p> <p>Full knowledge of historical and current storage methods, preservation, and the current and long-range impact of all types of storage systems.</p> <p>Full knowledge of current systems, technologies, and procedures used in the provision of information services; concepts of fair use, copyright law, state and federal public records law, and intellectual property rights.</p> <p>Full knowledge of and ability to interpret multiple, complex sets of standards, policies and procedures; applies knowledge to extrapolate from existing guidelines to specific situations.</p> <p>Ability to stay informed of current developments, trends, and technologies in archival and records management, particularly in the area of digital technology as it relates to archival and records management.</p> <p>Full knowledge of the organization and operation of state and local governments. Applies full knowledge of North Carolina history, its people, and places and how government has evolved.</p>	<p>Thorough knowledge of the principles and practices of archival and records management. Thorough knowledge of and ability to apply metadata standards.</p> <p>Thorough knowledge of and ability to conduct research using extensive primary and secondary resources.</p> <p>Thorough knowledge of historical and current storage methods, preservation, and the current and long-range impact of all types of storage systems.</p> <p>Ability to interpret and apply thorough knowledge of concepts of fair use, intellectual property rights, copyright law, and state and federal public records law.</p> <p>Ability to interpret and apply thorough knowledge to standards, policies and procedures in new or unique situations.</p> <p>Ability to stay informed of current developments, trends, and technologies in archival and records management, particularly in the area of digital technology; ability to seek and develop ways to promote electronic access to collections.</p> <p>Thorough knowledge of the organization and operation of state and local governments. Extensive knowledge of North Carolina history, its people, and places. Knowledge of concepts of fiscal, legal and historic evidentiary and archival value.</p>

Archival and Records Management

Ability to apply practices and techniques of archival and records management to assigned area of responsibility including appraisal, accessioning, disposition, arranging, and describing public and private records and collections; ability to promote access to records and collections by all users. Ability to organize and manage a large volume of material.

Contributing	Journey	Advanced
<p>Ability to appraise, arrange, and describe records and documents transferred to State Archives; ability to produce finding aids to promote access to the records and documents.</p> <p>Ability to analyze, appraise, describe, and assign disposition to public records; ability to provide access as needed.</p> <p>Ability to provide basic reference and consultative services; ability to assist clients in meeting their clients' needs.</p> <p>Ability to conduct basic research using primary source materials; may require ability to conduct historical research.</p> <p>Ability to preserve confidentiality and security of records and materials; ability to abide by policies and practices.</p>	<p>Ability to appraise, arrange, describe and reference records and documents transferred to State Archives; ability to produce finding aids to promote access to the records and documents at a higher level or in a specialty area.</p> <p>Ability to analyze, appraise, describe, and assign disposition to public records at a higher level or in a specialty area; ability to promote access to public records.</p> <p>Ability to provide specialized reference and consultative services; ability to advice on best practices in archival and record management stewardship and techniques.</p> <p>Ability to conduct in-depth research using primary and secondary source materials.</p> <p>Ability to monitor compliance with confidentiality and security policies and practices; identify issues and concerns.</p>	<p>Ability to supervise and lead staff in appraising, arranging, and describing records and documents; ability to arrange and describe complex and/or special collections.</p> <p>Ability to supervise and lead staff in analyzing, appraising, describing, and assigning disposition to public records; ability to work with more complex records and/or situations.</p> <p>Ability to provide extensive consultation on complex issues and make determinations regarding reformatting of records.</p> <p>Ability to conduct complex research using primary and secondary source materials; ability to supervise lower level staff in conducting research.</p> <p>Ability to ensure full compliance with confidentiality and security policies and practices within work unit; ability to assist in modification of policies and practices as needed.</p>

Client/Customer Services

Ability to develop and maintain effective relationships with clients or customers by listening to the client/patron and understanding and responding to identified needs. Ability to collect information, conduct searches, investigate and guide client/patron to appropriate sources for help or information.

Contributing	Journey	Advanced
<p>Ability to assist patrons by providing routine information and resources; ability to assist patrons in solving routine problems in using technology, resources and facilities.</p> <p>Ability to collect information; conducts routine searches. Ability to select among a large and complex variety of resources. Ability to use complex search strategies to obtain results.</p> <p>Ability to conduct research for special requests from legislators and/or other government officials.</p>	<p>Ability to assist patrons by providing complex information and resources; ability to assist patrons in solving non-routine problems in using technology, resources, and facilities.</p> <p>Ability to conduct non-routine searches. Ability to conduct research interviews, investigates and selects among a large and complex variety of resources to find the needed information. Ability to develop search strategies, using complex databases, and other reference tools. Ability to collect information to assist in developing customized reference and support for groups of clients.</p> <p>Ability to conduct complex and/or specialized research for special requests from legislators and/or other government officials.</p>	<p>Ability to assist patrons by providing customized information and resources using specific knowledge in area of specialization. Ability to assist patrons in solving varied, complex, and non-routine problems in using technology, resources and facilities.</p> <p>Ability to conduct sophisticated searches using complex and original search strategies using complex databases, and other reference tools.</p>

Communication and Interpersonal Skills

Ability to provide information to individuals or groups; ability to deliver presentations suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely to groups or individuals either verbally or in writing to ensure that they understand the information and the message. Ability to listen and respond appropriately to others. Ability to develop and maintain effective working relationships in order to support effective communication and teamwork. Ability to build and use collaborative relationships to facilitate the accomplishment of program goals; ability to seek and identify opportunities to build strategic relationships.

Contributing	Journey	Advanced
<p>Ability to present ideas in a clear, concise, organized manner.</p> <p>Ability to communicate about services, processes, policies, and procedures to internal and external audiences.</p> <p>Ability to maintain effective working relationships with others.</p> <p>Ability to build collaborative relationships to meet branch/unit goals.</p>	<p>Ability to explain specialized and educational programs and topics, as well as policies and procedures of the agency to meet the specific needs of clients/patrons. Ability to communicate information related to the overall operations.</p> <p>Ability to respond to requests/issues that deviate from standard operating procedures. Ability to respond to requests for program, policy, and procedural information. Ability to contact service recipients to provide or obtain information.</p> <p>Ability to serve as role model for others in developing and maintaining effective working relationships.</p> <p>Ability to work with both internal and external organizations to facilitate the goals of the department and agency.</p>	<p>Ability to interpret guidelines, answer inquiries and advise others regarding processes, services, and operations as applied to non-standard situations. Ability to communicate expectations to other employees, which may include formal/informal training.</p> <p>Ability to apply knowledge of programs, policies, and procedures to interpret and communicate information to meet the needs of non-standard situations. Ability to review and revise policies and procedures to accommodate new technologies, audiences, or legislation.</p> <p>Ability to actively promote teamwork to achieve goals of work unit and section.</p> <p>Ability to build collaborative relationships throughout the state and nationally in order to meet department and agency goals; coach others in building collaborative relationships.</p>

Training

Ability to design, develop, and deliver training and workshops to staff, researchers, local and state government agencies, and the general public.

Contributing	Journey	Advanced
<p>Ability to deliver training to various audiences.</p> <p>Ability to conduct workshops and training for local and state government employees, department staff, and the general public.</p>	<p>Ability to develop and deliver training to meet the needs of various audiences.</p> <p>Ability to develop and conduct workshops and training for state and local government employees, department staff, and the general public.</p>	<p>Ability to identify training needs of various audiences; develop and modify training materials to meet those needs.</p> <p>Ability to coach others in developing and delivering workshops and training for state and local government employees, department staff, and the general public.</p>

Human Resources Management

Ability to establish work rules and acceptable levels of quality and quantity of work; ability to review work and measures performance of others. Ability to recruit, select, develop, counsel, discipline, and evaluate performance of employees to retain a diverse workforce; ability to administer and ensure compliance with human resources policies and procedures. Ability to identify skills and abilities to fulfill current or future job or role responsibilities more effectively. Ability to plan and support the development of others.

Contributing	Journey	Advanced
<p><i>Not applicable.</i></p>	<p>May require ability to coordinate the work of others.</p> <p>May require ability to review the work of others.</p>	<p>Ability to manage and direct the work of others; ability to make work assignments.</p> <p>Ability to establish employee work expectations; ability to develop and implement work plans; ability to review performance based on the work plan; ability to prepare performance reviews.</p> <p>Ability to recruit and select employees; ability to ensure the recruitment, development, and retention of a diverse workforce.</p> <p>Ability to assess employee skills; ability to identify and recommend career development opportunities with employees.</p>

Planning and Organizing Work/ Administrative Support

Ability to develop plans to accomplish work operations and objectives; ability to arrange and assign work to use resources efficiently. Ability to provide administrative support for the business operations by performing purchasing and/or budgetary functions.

Contributing	Journey	Advanced
<p>Ability to implement the delivery and improvement of services, staffing and resources.</p> <p>May require ability to purchase supplies and or/equipment by utilizing appropriate purchasing systems, policies and procedures.</p> <p>May require ability to monitor branch/unit budgets adhering to agency guidelines.</p>	<p>Ability to help plan and implement the delivery and improvement of services, staffing and resources, some of which may include larger staff, multiple programs, or moderately complex or significant programs.</p> <p>May require ability to monitor and maintain inventory of supplies.</p> <p>May require ability to monitor contracts; may negotiate with vendors and consult with vendors working with local governments.</p>	<p>Ability to direct higher-level planning, organizing, and staffing for complex unit(s). May require ability to coordinate through subordinates. Ability to contribute to strategic planning. Ability to actively provide oversight to unit.</p>

V. MINIMUM TRAINING & EXPERIENCE

Bachelor’s degree in history, public history, public administration, or a related social science discipline and one year of archival or records management experience; or an equivalent combination of training and experience. All degrees must be received from appropriately accredited institutions.

Note: This is a generalized representation of positions in this class and is not intended to identify essential work functions per ADA. Examples of competencies are primarily those of the majority of positions in this class, but may not be applicable to all positions.