

## Position Description

|                           |   |
|---------------------------|---|
| Employment Agreement:     | PSA/DHBs South Island Administrative MECA                       |
| Position Title:           | <b>Corporate Records Advisor</b>                                |
| Service & Directorate:    | Corporate Records (Records and Information Management Services) |
| Location:                 | <b>Dunedin</b>  |
| Reports to:               | Corporate Records Specialist                                    |
| Number of direct reports: | Nil   |
| Date:                     | October 2021  |

### Our Vision

Better Health, Better Lives, Whānau Ora

We work in partnership with people and communities to achieve their optimum health and wellbeing  
We seek excellence through a culture of learning, enquiry, service and caring

### Our Shared Values and Behaviours

| Kind<br><i>Manaakitanga</i>   | Open<br><i>Pono</i>  | Positive<br><i>Whaiwhakaaro</i>   | Community<br><i>Whanaungatanga</i>  |
|---|--|---|---|
| <p><b>Looking after our people:</b><br/>We respect and support each other. Our hospitality and kindness foster better care.</p> | <p><b>Being sincere:</b><br/>We listen, hear and communicate openly and honestly. We treat people how they would like to be treated.</p> | <p><b>Best action:</b><br/>We are thoughtful, bring a positive attitude and are always looking to do things better.</p> | <p><b>As family:</b><br/>We are genuine, nurture and maintain relationships to promote and build on all the strengths in our community.</p> |

### Our statutory purpose

To improve, promote and protect the health of our population

- Promote the integration of health services across primary and secondary care services
- Seek the optimum arrangement for the most effective and efficient delivery of health services
- Promote effective care or support for those in need of personal health or disability support services
- Promote the inclusion and participation in society and the independence of people with disabilities
- Reduce health disparities by improving health outcomes for Māori and other population groups
- Foster community participation in health improvement and in planning for the provision of and changes to the provision of services
- Uphold the ethical and quality standards expected of use and to exhibit a sense of social and environmental responsibility

## PURPOSE OF ROLE

The purpose of this role is to assist with corporate records management activities and projects. Work involves appraising and processing physical and electronic corporate records for retention and disposal, responding to and logging corporate records access requests, providing advice and training to Southern DHB staff including supporting services to carry out compliant digitisation, and contributing to the development and ongoing improvement of an effective corporate records management framework.

## Competencies

The following competencies apply to this position. The employee will be assessed against these as part of their annual performance and development review.

### Organisational Competencies

|                            |   |
|----------------------------|---|
| <b>Customer Focus</b>      | Is dedicated to meeting the expectations and requirements of internal and external customers; gets first hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect |
| <b>Drive For Results</b>   | Can be counted on to exceed goals successfully; Is constantly and consistently one of the top performers; very bottom line oriented; steadfastly pushes self and others for results.  |
| <b>Integrity and Trust</b> | Is widely trusted; is seen as a direct, truthful individual; can present the unvarnished truth in an appropriate and helpful manner; keeps confidences; admits mistakes; doesn't misrepresent him/herself for personal gain.  |

### Role Specific Competencies

|                               |  |
|-------------------------------|--|
| <b>Decision Quality</b>       | Makes good decisions (without considering how much time it takes) based upon a mixture of analysis, wisdom, experience and judgement: most of his/her solutions and suggestions turn out to be correct and accurate when judged over time: sought out by others for advice and solutions   |
| <b>Organisational Agility</b> | Knowledgeable about how organisations work; knows how to get things done both through formal channels and the informal network; understands the origin and reasoning behind key policies, practices, and procedures; understands the cultures of organisations.  |
| <b>Priority Setting</b>       | Spends his/her time and the time of others on what's important. Quickly zeros in on the critical few and puts the trivial many aside. Can quickly sense what will help or hinder accomplishing a goal. Eliminates roadblocks. Creates focus.   |
| <b>Problem Solving</b>        | Uses rigorous logic and methods to solve difficult problems with effective solutions; probes all fruitful sources for answers; can see hidden problems; is excellent at honest analysis; looks beyond the obvious and doesn't stop at the first answers  |
| <b>Process Management</b>     | Good at figuring out the processes necessary to get things done; knows how to organise people and activities; understands how to separate and combine tasks into efficient work flow; knows what to measure and how to measure it; can see opportunities for synergy and integration where others can't; can simplify complex processes; gets more out of fewer resources. |

### KEY RELATIONSHIPS

| Within Southern DHB   | External to Southern DHB   |
|---|--|
| <ul style="list-style-type: none"><li>Records and Information Manager</li></ul> | <ul style="list-style-type: none"><li>Archives New Zealand (and Regional Archives)</li></ul> |
| <ul style="list-style-type: none"><li>Corporate Records team</li></ul>          | <ul style="list-style-type: none"><li>TIMG Document Destruction</li></ul>                    |
| <ul style="list-style-type: none"><li>All administration staff</li></ul>        | <ul style="list-style-type: none"><li>Waste Management Limited</li></ul>                     |
| <ul style="list-style-type: none"><li>Service Managers</li></ul>                | <ul style="list-style-type: none"><li>Stakeholders</li></ul>                                 |

## PERSON SPECIFICATION

The expertise required for a person to be fully competent in the role. Position specific competencies:

|   | ESSENTIAL   | DESIRABLE   |
|---|---|---|
| <b>Education and Qualifications (or equivalent level of learning)</b> | <ul style="list-style-type: none"> <li>NCEA Level 2 or equivalent minimum</li> </ul>  | <ul style="list-style-type: none"> <li>A tertiary qualification in or related to information and records management</li> </ul>                                      |
| <b>Experience</b>   | <ul style="list-style-type: none"> <li>At least one year working in a records and information management role</li> <li>Experience working in a team-orientated, collaborative environment</li> </ul>  | <ul style="list-style-type: none"> <li>One or more years in a dedicated records and information management role at a hospital</li> </ul>                            |
| <b>Knowledge and Skills</b>   | <ul style="list-style-type: none"> <li>Sound understanding of core records management concepts and principles</li> <li>Knowledge of the Public Records Act 2005, General Disposal Authority for DHBs 2006 (DHB GDA), Archives New Zealand Information and Records Management Standard, and ISO 15489 Information and Documentation – Records Management</li> <li>Able to understand and follow instructions, as well as make logical decisions in timely manner when required</li> <li>Good literacy and numeracy skills</li> <li>Competent user of MS Office applications, particularly Outlook, Excel and Word</li> <li>Great interpersonal, written and verbal communication skills</li> <li>Organised, self-motivated and able to work independently</li> </ul> | <ul style="list-style-type: none"> <li>Experience using Microsoft 365 Teams and SharePoint Online</li> <li>Experience developing and delivering training</li> </ul> |
| <b>Personal Qualities</b>   | <ul style="list-style-type: none"> <li>Passion for records management</li> <li>Attention to detail</li> <li>Adaptable to continuous change</li> <li>Physically agile</li> <li>Positive, “can do” attitude</li> <li>Sense of humour</li> <li>Respects privacy and confidentiality of information</li> </ul>  |   |

### KEY RESULT AREAS:

| Key Accountabilities:   | Example of successful delivery of duties and responsibilities   |
|---|---|
| <b>Provide advice on and carry out appraisal, sentencing and disposal of corporate records</b>  |   |
| <ul style="list-style-type: none"> <li>Provide advice on business and legislative requirements, in consultation with the Corporate Records Specialist.</li> </ul> | <ul style="list-style-type: none"> <li>All physical corporate records held by the Southern DHB are stored appropriately, assigned the suitable DHB GDA classification or precedent, and can be retrieved quickly and easily.</li> </ul> |

|   |   |
|---|---|
| <ul style="list-style-type: none"> <li>Identify high value records from trivial and low value records and information.</li> <li>Sentence all corporate records accurately in accordance with the General Disposal Authority for District Health Boards (DHB GDA).</li> <li>Communicate with the Corporate Records Specialist about any precedents that may need to be established and documented.</li> <li>Process physical 'inactive' and 'closed' records for disposal once minimum retention period has been met.</li> </ul> | <ul style="list-style-type: none"> <li>Compliance with Public Records Act is achieved.</li> </ul>   |
| <b>Add to and help maintain the Southern DHB Records Database (SharePoint Online)</b>   |   |
| <ul style="list-style-type: none"> <li>Enter and update metadata about physical corporate records in the Southern DHB Records Database.</li> <li>Correct any data entry mistakes or typos identified.</li> <li>Assist with the development of database entry rules for particular record types.</li> <li>Communicate with the Corporate Records Specialist about any Database settings issues or additions.</li> </ul>  | <ul style="list-style-type: none"> <li>All physical records are captured in the Southern DHB Records Database and the data is correct, up-to-date and meets the set data entry standard.</li> </ul>   |
| <b>Respond to corporate records access requests</b>   |   |
| <ul style="list-style-type: none"> <li>Respond to and log corporate records access requests from staff and the public that fall outside of Official Information Act, Privacy Act and Royal Commission s.20 requests.</li> <li>Assist with locating records required as part of Official Information Act, Privacy Act and Royal Commission s.20 requests, including carrying out any related research.</li> </ul>  | <ul style="list-style-type: none"> <li>All requests are responded to within 20 working days.</li> <li>All requests to access Southern DHB's corporate records are tracked.</li> <li>Confidentiality and privacy are always considered before releasing corporate records (originals and copies) to the requestor.</li> </ul>                                |
| <b>Contribute to the development, review and improvement of the corporate records framework</b>   |   |
| <ul style="list-style-type: none"> <li>Engage in discussion about corporate records management policies, processes and systems.</li> <li>Assist with training design and delivery.</li> <li>Provide feedback on draft procedure(s).</li> <li>Raise any issues, concerns or ideas about current practices.</li> </ul>  | <ul style="list-style-type: none"> <li>Southern DHB's records management systems and processes are consistent across all sites, meet business needs and ensure best practice.</li> <li>Southern DHB staff have access to corporate records training and education materials, and understand their corporate records management responsibilities.</li> </ul> |
| <b>Support services to carry out compliant digitisation of physical corporate records</b>   |   |
| <ul style="list-style-type: none"> <li>Meet with services to discuss digitisation compliance requirements and assist with documenting agreed procedure.</li> <li>Provide any in-person digitisation training required.</li> <li>Undertake regular audits of digitised records.</li> </ul>   | <ul style="list-style-type: none"> <li>All routine and bulk digitisation is carried out compliantly by services with documented procedures specific to the service or record type in place.</li> </ul>  |
| <b>Other Duties</b>   |   |
| <p>Undertake duties from time to time that may be in addition to those outlined above but which fall within your capabilities and experience.</p>   | <ul style="list-style-type: none"> <li>Requests for assistance in own and other areas are responded to positively, demonstrating adaptability and willingness.</li> <li>The work produced complies with SDHB processes and reflects best practice.</li> </ul>   |

|   |  |
|---|--|
|   | <ul style="list-style-type: none"> <li>• Research undertaken is robust and well considered.</li> </ul>   |
| <b>Living Southern DHB Values</b>   |  |
| Proactively demonstrating Southern DHB values in all aspects of the role.   | <ul style="list-style-type: none"> <li>• You demonstrate behaviours that we want to see from each other, at our best.</li> <li>• You contribute positively to a culture of appreciation, a learning culture, where people feel safe to speak up.</li> <li>• You contribute positively to team and other initiatives that seek to improve patient and whanau experiences and/or staffs experience of working.</li> </ul>  |
| <b>Professional Development – self</b>  |  |
| Identifying areas for personal and professional development.  | <ul style="list-style-type: none"> <li>• Training and development goals are identified/agreed with your manager.</li> <li>• Performance objectives reviewed annually with your manager.</li> <li>• You actively seek feedback and accept constructive criticism.</li> </ul>  |
| <b>Health, Safety and Wellbeing</b>   |  |
| Taking all practicable steps to ensure personal safety and the safety of others while at work, in accordance with the Southern DHB’s Health, Safety and Wellbeing policies, procedures and systems. | <ul style="list-style-type: none"> <li>• You understand and consistently meet your obligations under Southern DHB’s Health and Safety policy/procedures.</li> <li>• You actively encourage and challenge your peers to work in a safe manner.</li> <li>• Effort is made to strive for best practice in Health and Safety at all times.</li> </ul>  |
| <b>Treaty of Waitangi</b>   |  |
| Giving effect to the principles of the Treaty of Waitangi – Partnership, Participation and Protection through your interaction with others on a day to day basis.                                   | <ul style="list-style-type: none"> <li>• <i>Partnership</i> – You interact in good faith and in the nature of a partnership. There is a sense of shared enterprise and mutual benefit where each partner takes account of the needs and interests of the other.</li> <li>• <i>Participation</i> – You work in partnership with our treaty partners to enable our organisation to prosper. You are mindful of the varying socio-economic conditions that face our people and work hard to remove barriers of access to health and education.</li> <li>• <i>Protection</i> – You work proactively to protect the rights and interests of Māori, including the need to proactively build the capacity and capability of Māori.</li> </ul> |

Note: the above example measures are provided as a guide only. The precise performance measures for this position will require further discussion between the job holder and manager.

**For Job Evaluation Purposes:** (As per the current Southern DHB Delegation of Authority Policy)

Number of direct reports: 0  
Southern DHB Delegation of authority (level 1 – 5): N/A

**Staff Authority**

Authority to engage, promote, discipline and dismiss staff

No authority:

Authority to engage, promote, discipline/dismiss direct reports with consultation of manager:  
 YES - on a delegation of authority basis  
 Ultimate authority, engage, promote, discipline and dismiss staff at any level below his/her own:  
 YES – on a delegation of authority basis

**Contractual Authority**

Authority to enter into agreements or contracts on behalf of the Southern DHB

- Limited: NO
- Long term \$1.5 to \$3 million NO
- Long term in excess \$3 to \$7.5 million NO

**Work Complexity**

Will undertake all duties and solve problems at the discretion of and in consultation with the Corporate Records Specialist

**Freedom To Act**

Work with the Corporate Records Specialist can identify own strategies with minimal guidance

**Financial Responsibilities**

- Controls a budget - NO
- Maximum that may be spent without reference to manager - NIL
- Jobholder can spend unbudgeted capital – NO Amount: \$0
- Jobholder is responsible for committing the organisation to long-term contracts - NO
- Jobholder signs correspondence for Company – NO unless under Delegation of Authority

**CHANGES TO POSITION DESCRIPTION**

From time to time it may be necessary to consider changes to the position description in response to the changing nature of our work environment – including technological requirements or statutory changes. This Position Description may be reviewed as part of the preparation for your annual performance and development review.

Acknowledged / Accepted:

|          |      |
|----------|------|
| Employee | Date |
| Manager  | Date |