



Records Management Bulletin

Records management advice prepared for GNWT employees
by the Records Management Unit of Public Works and Services
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Training Needs Assessment

Public Works and Services offers a number of training courses in records management. This bulletin will help you decide which courses are right for you.

Who Are You?

Your training needs are based on your records management tasks. The more knowledge and skills you need, the more training you will require. The Government of Canada has identified the core knowledge and skills that records management staff need. You can find the complete list at http://www.imforumgi.gc.ca/documents/2000/compet/compet01_e.asp.

There are four levels of knowledge and skills in the federal government's model:

- **Entry Level** – This person files and retrieves records for other employees.
- **Technical Level** – This person provides research and classification services, oversees the filing and retrieval of records, and prepares records for retention and disposal.
- **Professional (Expert) Level** – This person develops and maintains records management services within a department and provides advice to management and employees. This person may supervise other employees.
- **Manager Level** – This person develops policies and services for records management, and advises senior management. This position may have records analysts and other personnel reporting to it.

We will add one more competency level to this list:

- **General** – a position that creates and uses records, but which does not have specific records management duties. Essentially, anyone who does not have the word “records” in his or her job title.

Competencies

The following is a list of the knowledge and skills that employees at each level should have:

- **General Level**
 - Aware of the records management program.
 - Basic knowledge of the classification system.
 - Able to classify his or her own paper and electronic documents.
 - Basic knowledge of filing and retrieval procedures.
- **Entry Level**
 - Basic knowledge of the records management program.
 - Able to classify and describe own and other people's records.
 - Able to locate and retrieve records.
 - Able to follow records storage procedures for paper and electronic records.

- Able to prepare records for storage or disposal following a retention and disposition schedule.
- **Technical Level**
 - Able to implement a records management program.
 - Able to advise employees on records management issues.
 - Able to inventory records and convert filing systems.
 - Able to develop classification systems.
 - Able to apply classification systems and review the work of others.
 - Able to locate and retrieve records, and prepare research documents.
 - Able to develop systems for storing and protecting records.
 - Able to implement vital records programs.
 - Able to design and implement retention and disposition schedules.
 - Able to use records management software.
- **Professional Level** - similar to the Technical level, but has more in-depth knowledge. The expert can plan and design a records management program to be implemented by technical and entry level employees. The expert also has the ability to review and evaluate the work of others.
- **Managerial Level** – The manager has expert level understanding of all areas of records management. He or she is able to establish records management programs and policies, and plan the work of others.

Records Management Courses

Public Works and Services offers courses that benefit employees at all levels. The following is a list of the records management courses. The “X” indicates that it is suitable for an employee in a particular level. You will find the training calendar online at <http://www.pws.gov.nt.ca/trainingcalendar/trainingcalendar.asp>.

	General	Entry	Technical	Professional	Manager
Introduction to Records Management	X	X	X	X	X
Administrative and Operational Records Classification Systems		X	X	X	X
Processing Transfers to Storage and Final Disposition		X	X	X	X
What is a Departmental Records Management Program?			X	X	X
Implementation/Conversion Strategies for File Classification Systems			X	X	X
Developing a Vital Records Program			X	X	X
Managing Electronic Records	X	X	X	X	X
Developing ORCS and One-Time Records Schedules			X	X	X

For more information, contact your department’s records coordinator, or contact the Records Management Unit at 920-3009 or 873-7446