

RECORDS LEAD – SACRAMENTO

Weintraub Tobin (WT) is an innovative provider of sophisticated legal services to dynamic businesses and business owners, individuals, emerging companies, and nonprofits. From locations in Sacramento, San Francisco, Los Angeles, Orange County, and San Diego, more than 80 attorneys assist clients throughout California with business and litigation needs, including corporate law, finance and tax law, labor and employment, real estate, intellectual property, entertainment, and digital media. We maintain our leadership position by creating a value-added, trust-based relationship with our clients, supporting our local communities, and developing deep subject-matter expertise. We offer a supportive and collegial environment where individual contributions are recognized and celebrated, and hard work is balanced with personal fulfillment and responsibilities.

WT is seeking a full time (37.5 - 40 hrs. per week) Record Lead for our Sacramento office. This position will report directly to the Firm's Operations Supervisor. The Records Lead is expected to maintain records management system across the Firm. They act as archivists for sensitive and confidential client data. This position must follow consistent document management methods and organization of for paper and electronic records. They ensure accuracy, track the current location of on and off-site files, and document the destruction of files. This position will also be tasked to improve current recordkeeping processes and filing systems and is expected to work collaboratively with all levels of the Firm.

REQUIREMENTS AND EXPECTATIONS:

- Create, approve, and enforce policies and practices regarding digital and paper records, including organization and disposal.
- Develop a records storage plan, including short and long-term housing of physical records and digital information.
- Execute a retention policy on the disposal of digital and paper records no longer required for operational reasons; according to organizational policies, statutory requirements, and other regulations.
- Work closely with IT to create and maintain metadata and folder structure incorporated in digital document management systems and create automated records filing process in various systems.
- Perform annual reviews/updates on the Records Retention Schedules by interviewing employees and conducting records inventories.
- Coordinate access to records internally and outside the organization, and balance the requirements of business confidentiality, data privacy, and public access.
- Vendor relationship management for the digital document imaging platform and off-site paper storage facilities.
- Provide records management training to all relevant employees, including on-boarding and orientation processes.
- Provide record management awareness and guidance to employees as needed.

- Other duties or projects may be assigned.

EDUCATION AND EXPERIENCE:

- High School Diploma or equivalence
- 2+ years in a Supervisory role is preferred
- Reliability: Consistent and proven track record of reliable attendance and punctuality.
- Communication: Listen well and ask for clarification when appropriate; Respond well to questions; Write clearly and informatively; Edit work for spelling and grammar. Strong oral and written communication skills, with both internal and external stakeholders.
- Professionalism: Approach others in a tactful manner; React well under pressure; Accept responsibility for own actions; Follow through on commitments; Team Player.
- Judgment: Display willingness to make independent decisions when needed; Support and explain reasoning for decisions; Include appropriate people in decision-making process
- Quality: Demonstrate accuracy and thoroughness; Look for creative ways to improve and promote quality; Apply feedback to improve performance; Monitor own work to ensure quality; Take pride in own work; Prioritize and plan work activities. Strong sense of quality assurance principles, understanding of potential process failure points and the ability to mitigate quality risks. Strong attention to detail is required.
- Adaptability - Adapt to changes in the work environment; Able to deal with frequent change, delays, or unexpected events; Ability to prioritize duties.

PHYSICAL DEMANDS

While performing the duties of Records Lead, the employee is regularly required to use office equipment and computers, sit or stand for long periods of time, walk frequently, often lift up to 50 pounds, reach and lift overhead, bend and/or stoop. Some or all of these functions may cause muscle or eye strain.

EQUAL EMPLOYMENT OPPORTUNITY

The Firm is an equal opportunity employer. It is Firm policy to provide equal opportunities to all qualified individuals regardless of race, color, creed, religion, national origin, sex, age, physical or mental disability, medical condition, marital status, sexual orientation, sexual identity, genetics, veteran status, or any other class protected under federal, state, or local law. This policy applies to all terms and conditions of employment. It is the intent of the Firm to comply with all applicable federal and state laws with respect to fair employment practices. The Firm will provide reasonable accommodation to qualified applicants and employees with a known disability or medical condition or for an employee's religious beliefs provided the

accommodation does not cause undue hardship to the Firm. Any applicant or employee with a qualifying disability or medical condition, or a religious practice, that requires an accommodation in order for the employee to perform the essential function of his or her job, should contact Human Resources to discuss it further so the Firm can determine if a reasonable accommodation exists and can be provided.

Qualified candidates are encouraged to submit a cover letter and resume to recruiting@weintraub.com.