



## **TERMS OF REFERENCE**

### **RECORDS MANAGEMENT SPECIALIST**

### **INITIAL DEVELOPMENT OF INTERGRATED RECORDS MANAGEMENT PROGRAMME**

### **PROGRAMME (RETENTION AND DISPOSAL SCHEDULES OF FINANCE RECORDS)**

## **BACKGROUND**

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The Municipality is obliged by the Constitution of the Republic of South Africa, National Archives and Records Services Act read in unison with EC Provincial Archives and Records Services Act to adhere to proper records management that promotes effective and efficient administration and complete management of financial, legal and administrative records within governmental bodies. Such that mechanisms have to be put in place that will guide the legal retention and disposal of records. This document is compiled to advise prospective bidders on the setting we require for the advertised Induction and Training of the Occupational Health and Safety Committee.

### **Requirements**

All prospective suppliers should provide 1 facilitator with at least 5 (five years) experience in the records management consultancy work on the field. Such facilitator/s should also be in possession of Seta Accreditation Certificate.

### **Terms of Reference / Deliverables**

Given the above context, Mbizana LM is seeking a Records Management Specialist consultancy to deliver the following:

1. Support the Implementation of IRM programme in compliance with records best practices including system analysis methodologies, records and information management implementation processes and procedures and workflow processes required for implementation.
2. Implement and maintain the system classification scheme, controlled vocabulary and develop retention and disposal schedules.
3. Collaborate with IT to define and address the incorporation of lifecycle records management requirements of financial records into information management systems design.
4. Establish and manage access control protocols for records management systems. Further, implement and maintain security classification framework, policies, and

procedures according to records management best practices and organizational requirements for financial records.

5. Communicate with key stakeholders to proactively ensure organizational understanding of the interrelationship of records and business processes broadly encompassing fundamentals underpinning retention and disposal of records.
6. Tools of trade necessity for organizing, maintain, retention and retrieval of records i.e. storage boxes.

#### **Qualifications**

- Consultant undertaking the assignment should have a minimum of (5 years) of experience in records management.
- A relevant advanced university degree, or equivalent professional work experience combined with a university degree in a related field. A first level university degree in combination with qualifying experience may be accepted in lieu of the advance university degree.
- Certification(s) in records management
- Experience with implementing electronic Records Management systems. Demonstrated experience in electronic records management in a SharePoint environment is an asset.
- Experience ensuring usability and user-friendliness of records management instruments.
- Demonstrated experience in developing and implementing a classification scheme of all HR document types, record retention schedules and document metadata standard.
- Demonstrated experience in creating and evaluating records management system.
- Ability to present highly complex arguments, information and ideas in an easy to understand and memorable fashion.

Thank you.

.....*Z. Gwala*.....

**Mr. Z. Gwala**

**Senior Manager: Corporate Service**