

## Role profile

<b>Role title</b>	<b>Records specialist</b>
<b>Department and directorate</b>	<b>BMA Technology Services</b>
<b>Grade</b>	
<b>Reports to (job title)</b>	<b>Information governance lead &amp; DPO</b>
<b>Direct reports (job titles)</b>	<b>None</b>

### *Job Overview– purpose of the role*

*Describe as concisely as possible the overall purpose of the job and what success looks like. **Please limit this to a maximum of four or five sentences***

The Records specialist provides access to accurate records for operational, strategic and compliance purposes and ensures that legal requirements for the creation and retention of records are met.

Day to day the postholder will:

- Manage the work associated with delivering subject access requests for members within required timescales
- Ensure completion of Requests to be Forgotten within required timescales.
- Work with the Archives specialist on the identification and transfer of records into the archive.
- Work with the Information governance lead to ensure the correct governance, safeguarding, handling and delivery of information held by and used within the Association.
- Work with the Information governance lead to manage digital and physical records held by the Association and ensure that they are handled in line with relevant legislation.
- Review, implement and communicate change on all matters relating to records management.

### *Duties and Responsibilities*

*What are the core duties/responsibilities required to be performed in the role. (e.g., to provide a full range of administrative support services to the department including x,y,z)*

**Please provide a bullet point list**

#### **Records management**

- Work with the Information governance lead to define clear policies for the use of records and related systems.
- Work with the Information governance lead to advise staff across the Association on the management of records, compliance with relevant legislation and to ensure business continuity.
- Managing the processing of subject access requests from receipt to completion within legal timescales, and co-ordination of requests with outsourced provider and/or internal legal department when necessary
- Managing the processing of right to be forgotten requests from receipt to completion within legal timescales, and co-ordination of requests with outsourced provider and/or internal legal department when necessary
- Work with the Information governance lead to implement a lifecycle for all records, ensuring adequate retention and disposal as and when required. Provide each department with a retention schedule and ensure that this is maintained.

### Duties and Responsibilities

- Work with colleagues and stakeholders to define expert standards for records management.
- Work in collaboration with colleagues in BMA Communications to promote and execute records management standards and offer guidance, training and support to all BMA staff in areas of records management.
- to evaluate and recommend suitable records management system for the BMA
- to lead on the governance around the system's implementation and day to day running.
- to co-ordinate the accountabilities of records and archives with the subject expert Archivist
- to co-ordinate with BMJ in the conformance to records management standards

### General

- Contribute to departmental planning as required.
- Contribute to departmental and cross-directorate projects as required.
- Take responsibility for continuing personal and professional development and keeping skills and knowledge up to date.
- Represent the department to the wider records management profession.
- Any other duties appropriate to the grade may be assigned by the post-holder's line manager from time to time.

### Skill (level and breadth of application)

*What relevant experience is necessary to undertake this role? What specialist, technical or professional qualifications are required to be able to perform the job?*

*How far does the role extend out across the organisation, eg confined to own team, involves co-ordination with another department or requires regular negotiation with many other parts of the organisation. Why is this necessary? Describe the range of issues that are involved in this, eg resolving people's IT problems, collecting information on key research items or advising members on a particular issue.*

- Significant experience of managing subject access requests, ideally in a membership or professional organisation.
- Demonstrable knowledge of data protection compliance requirements.
- Computer literacy with experience of using a records management system.
- Excellent communication and interpersonal skills and a proven ability to liaise with a wide range of colleagues and departments.
- Strong organisational and administrative skills.
- Excellent and meticulous attention to detail.
- Ability to build strong professional relationships with colleagues across the BMA and to liaise effectively with staff in other departments.

### Intellectual demands (complexity and challenge)

*What sorts of problems, situations or issues are typically dealt with? Give any illustrative examples. How are the problems, situations or issues dealt with (eg undertaking original research and analysis or seeking specialist advice)?*

*To what extent are standard procedures and processes followed when undertaking typical tasks, and how is personal initiative used when solving problems? To what extent is creativity used in solving the problems (eg adopting different approaches, trying things that have not been done before within the organisation or improving/changing previous approaches).*

- Willing to embrace change with the ability to think creatively.
- Understand the legislative environment and make changes to processes accordingly
- Problems faced will tend to be routine– using own judgement to know what to refer upwards to manager.
- Keep skills up to date, proactive in seeking and addressing feedback, able to prioritise tasks and work to deadlines.

### Intellectual demands (complexity and challenge)

- Able to learn quickly – seeks and assimilates new knowledge, willing to learn from mistakes and achieve results.
- A flexible approach to duties in a changing records management environment.
- Understanding of confidentiality of records.

### Judgement (independence and level and impact limitations)

*What are the typical decisions that are made in the job without reference to any higher authority? What informs/constrains the decisions (eg expenditure limits, have to follow clearly laid down procedures or working within broad objectives). What influence upon policy, procedures or resources is there (eg giving advice to others)?*

*Who (or what) is next to be affected by the decisions that are made – for example, supervisor sees them before they leave the team or the whole department sees and has to respond to the change that is made. Give typical example(s) of the consequences of the decisions (eg what impact does the decision-making have on the performance of the team/section/department/organisation)?*

- Ability to horizon scan and identify any potential risks and highlight to line manager.
- Work with the Information governance lead to assess organisational and user requirements to provide appropriate services within available resources.
- Work will be reviewed by the Information governance lead.
- Ability to assess best fit technology for a records management system
- Ability to identify operational requirements for business-as-usual records management
- Ability to recognise legal obligations of subject access requests and their impact on the business

### Use of resources (supervision of resources and influence)

*What responsibility is there for managing people, equipment, budgets, resources, customer's welfare or confidential information? If this is a staff management role describe what is involved, eg staff reporting, staff development, appraisal, leading a department or the allocation of work.*

*How does the role fit within the organisation, eg support role, team member, team leader, specialist policy adviser, or leading major areas of core business?*

- Continually monitor enquiries and requirements for providing support across the organisation.
- Committed to monitoring, setting, and maintaining high standards of service delivery and customer service.
- Work with the Information governance lead to manage workload and ensure all deadlines are met.
- No direct budget management
- Key vendors contact for records management systems
- Supplier service management oversight
- Ability to use/promote usage of records management system

### Communication (level, internal and external demands and significance)

*What people are typically contacted (regardless of the medium) **inside** the Association, eg immediate colleagues, senior managers or administrators? Committee members are the only members classed as internal communication. Normal non-committee membership and doctors are external (see below)*

*Who is in regularly contact with the role holder **outside** of the Association, eg members who are not committee members, suppliers, members of the public? Approximately what percentage of the time is spent on external communications?*

*What is the purpose of these contacts, eg conveying information, gathering data?*

### Communication (level, internal and external demands and significance)

- Key contact for external communication with BMA members who have submitted Subject Access Requests and Requests to be Forgotten.
  - Internal communication with BMA colleagues in promotion of records management best practice, offering support and the resolution of service issues.
  - Excellent communication and interpersonal skills and a proven ability to liaise with a wide range of members, colleagues, stakeholders, and vendors at a variety of levels.
  - Collaborative – team player, positive regard for other people; able to work within and across small groups and as part of a larger whole.
  - Able to promote team values actively, including accepting and promoting agreed standards, encouraging and supporting colleagues and supporting management in achieving agreed goals.
  - Confident and enthusiastic.
- 

### Physical demands & coordination (physical effort and mental strain)

*Are there any unusual physical or mental demands of the role; for example, lifting heavy objects, standing for long periods, using VDUs extensively or high levels of concentration?*

- Ability to maintain focus and concentration while working in an open plan office.
- 

### Working conditions and emotional demands)

*What are the environmental conditions in which the work is conducted, the social and emotional demands faced by the role and the pressures resulting from these?*

- Personal resilience – able to withstand robust challenge from elected and other members and stakeholders.
-

## Values and behaviours

The post-holder is expected to execute their role in line with our five organisational values.

The following examples illustrate how we are using our values to inform how we act:

We are **leaders** because:

- We strive to always improve
- We take responsibility for our actions
- We collaborate with each other and work as one BMA for the good of our members
- We are proactive and prepared to guide our members and each other

We are **experts** because:

- We understand our members
- We draw on our collective experience and knowledge to solve problems
- We use our insights and research to make decisions
- We provide accurate, credible, relevant and engaging information
- We recognise our strengths and act upon them

We are **committed** because:

- We listen to our members and put them at the heart of everything we do
- We are respectful, inclusive, open and honest with our members and each other
- We approach everything we do with confidence and sensitivity

We are **reliable** because:

- We deliver on what we say we will do
- We are accessible and approachable
- We build trust by being consistent and supportive
- We are positive and decisive whatever the situation

We are **challenging** because:

- We fight, ethically and fearlessly, for the interests of all our members
- We work as a brave, assertive and effective champion for high quality health services and the advancement of the profession

## Sign-off

Manager:

Date:

Role holder:

Date: