# Records Management Skills - Self Assessment Survey

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| 1. **Name** |  |
| **2 . Position Title** |  |
| **3 . Time in Current Position** |  |

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| --- | --- | --- | --- |
| **4. Does the position have position description (PD)?** | Yes / No (Go To Qn 8) | **5. Is the PD accurate?** | Yes (Go To Qn 8) / No |

|  |  |
| --- | --- |
| **6. What duties need to be added to PD?** |  |
| **7. What duties are no longer performed by the position and need to be removed from PD?** |  |
| **8. What Records Management training have you attended within the last 3 years?** |  |
| **9. Is there any Records Management instruction or training you need to perform you job competently?** |  |

## Knowledge

| **Question** | **Strongly Agree** | **Agree** | **Disagree** | **Strongly Disagree** | **Evidence of Competence** | **Further skills/training wants or needs** |
| --- | --- | --- | --- | --- | --- | --- |
| 10. I have a good knowledge of relevant legislation that affects our business operations |  |  |  |  |  |  |
| 11. I have a good knowledge and understanding of the organisation's policies, strategies and procedures. |  |  |  |  |  |  |
| 12. I have a good knowledge of the organisation, its culture and structure, business and functions and activities that it performs. |  |  |  |  |  |  |
| 13. I have a good knowledge of the organisation's manual and automated records and archives systems. |  |  |  |  |  |  |
| 14. I have a good knowledge of recordkeeping concepts, principles and processes. |  |  |  |  |  |  |
| 15. I have a good knowledge of the organisation's records thesaurus/classification scheme and how to apply it. |  |  |  |  |  |  |
| 16. I have a good knowledge of organisational records appraisal, disposal and approval processes and its retention and disposal authorities. |  |  |  |  |  |  |
| 17. I have a good knowledge of what records are vital to the organisation in enabling it to manage risks and meet its obligations. |  |  |  |  |  |  |
| 18. I have a good knowledge of organisational procedures in relation to the transfer of custody, ownership and/or responsibility for records. |  |  |  |  |  |  |
| 19. I have a good knowledge of the organisation's security and access procedures for records. |  |  |  |  |  |  |
| 20. I have a good knowledge of the retrieval tools and finding aids for records and archives in my organisation. |  |  |  |  |  |  |

## Skills (examples - tailor for agency requirements)

| **Question** | **Strongly Agree** | **Agree** | **Disagree** | **Strongly Disagree** | **Evidence of Competence** | **Further skills/training wants or needs** |
| --- | --- | --- | --- | --- | --- | --- |
| 21. I am able to read and interpret records in order to classify them, apply retention and disposal authorities and access and security rules and conditions. |  |  |  |  |  |  |
| 22. I am able to use relevant recordkeeping technology to perform my work. |  |  |  |  |  |  |
| 23. I can operate appropriate equipment for moving records. |  |  |  |  |  |  |
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Thank you for your assistance.