

MANAGING PUBLIC  
SECTOR RECORDS

A Training Programme

A Model Scheme of  
Service for a Records and  
Archives Class



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INTERNATIONAL  
COUNCIL ON ARCHIVES



INTERNATIONAL RECORDS  
MANAGEMENT TRUST

A MODEL SCHEME OF SERVICE FOR A  
RECORDS AND ARCHIVES CLASS

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A STUDY PROGRAMME

General Editor, Michael Roper; Managing Editor, Laura Millar

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AND ARCHIVES CLASS

## MANAGING PUBLIC SECTOR RECORDS: A STUDY PROGRAMME

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Produced by the International Records Management Trust  
12 John Street  
London WC1N 2EB  
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Printed in the United Kingdom.

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## **General Editor**

Michael Roper has had a wide range of experience in the management of records and archives. He served for thirty-three years in the Public Record Office of the United Kingdom, from which he retired as Keeper of Public Records in 1992. He has also taught on the archives courses at University College London and the University of British Columbia, Canada. From 1988 to 1992 he was Secretary General of the International Council on Archives and since 1996 he has been Honorary Secretary of the Association of Commonwealth Archivists and Records Managers (ACARM). He has undertaken consultancy missions and participated in the delivery of training programmes in many countries and has written extensively on all aspects of records and archives management.

## **Managing Editor**

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## **Donors**

The International Records Management Trust would like to acknowledge the support and assistance of the following:

Association of Records Managers and Administrators (ARMA International)

British Council

British High Commission Ghana

British High Commission Kenya

Caribbean Centre for Development Administration (CARICAD)

Canadian International Development Agency (CIDA)

Commonwealth Secretariat

Department for International Development (East Africa)

Department for International Development (UK)

DHL International (UK) Limited

Foreign and Commonwealth Office Human Rights Fund

Hays Information Management

International Council on Archives

Nuffield Foundation

Organisation of American States

Royal Bank of Scotland

United Nations Development Program

# **A Model Scheme of Service for a Records and Archives Class**

**Prepared by the staff of the International Records Management Trust.**



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# ***A MODEL SCHEME OF SERVICE FOR A RECORDS AND ARCHIVES CLASS***

This manual is intended to be used in conjunction with *Developing Infrastructures for Records and Archives Services*, which is one of a series of three training modules providing an introduction for managers in the records and archives field to the executive issues affecting records and archives systems and services. However, the manual may also be used on its own by any country that is contemplating introducing or amending a scheme of service for records and archives staff.

## **INTRODUCTION**

This scheme of service should be read in conjunction with any scheme for the clerical and executive classes. Records management is a major function of the clerical and executive classes and, as such, warrants a separate scheme to show the recognised hierarchy of grades and grade designations used and the specific details of duties performed, entry qualifications required, progression criteria, training requirements and staff development expectations.

Records management is a critical support function. It involves the planning, organisation, monitoring and control of records and records procedures, through efficient and effective classification, storage, retrieval and application of agreed disposal schedules. It covers current records in records offices, semi-current records in the records centre and non-current records in the archival institution.

Officers appointed to any grade within the records class will be regarded as part of the staff of the agency in which they are required to serve. The head of that organisation is responsible for the smooth running of that organisation on a day-to-day basis and can organise, direct, monitor and control staff in the most efficient way in order to achieve its objectives. The head of the records class has overall responsibility for the professional training and development of records staff and will have the responsibility, in consultation with the line manager, of moving staff between agencies and to train and develop those staff in order to achieve effective records management systems and procedures.

The records class consists of a number of grades at different levels. Not all of these grades will be used in every organisation or location. The grading structure in any organisation can vary according to the needs of the work to be carried out. For example, in a headquarters organisation, each of (say) three records offices might be headed by a Records and Archives Supervisor but, in the regions one Records and Archives Supervisor may be responsible for a number of district records offices. Nevertheless, the levels that are considered appropriate must conform to the

designations and grade levels given in the list in the section headed 'composition'. Postholders undertaking similar work will not necessarily be graded at the same level if the range and complexity of the duties are of a different scale. For example, the manager responsible for reader services within the National Archives may be at a higher grade than his or her equivalent in a regional archival repository, or the manager with responsibility for the whole range of records of a large agency with many records offices may be at a higher grade than his or her equivalent in a small agency with only one records office.

If there is a regional structure, the scheme of service will be applied to staff in the records offices of regional administrative bodies and of regional branches of national agencies and to the staff of regional archival repositories. Where appropriate, responsibilities for the management of the class as specified within the scheme of service may be delegated to designated regional officers.

## OBJECTIVES

The main objectives of this scheme of service for officers in the records class are

- to attract people with the appropriate ability, ambition and integrity by offering a well defined career structure in the records class
- to ensure uniform standards, procedures and quality of work for the delivery of an efficient and effective records management support service throughout agencies and other institutions subject to the current records law
- to prescribe realistic qualification requirements (educational, training, and promotion criteria) in order to maintain professional standards.

The scheme lays the basis for an integrated national records and archives institution, which brings together the management of current records, semi-current records and non-current records (that is, archives). It provides the structure required to cater for the continuum of professional and technical skills and responsibilities involved in managing records from their creation through to their disposal or their preservation as archives.

## BACKGROUND

The records class is a class of general posts within the civil service as defined by the particular legislation governing the civil service, such as the Civil Service Act and established by the appropriate regulations relating to that legislation. Civil servants who are appointed to a class of general posts may be assigned for duty to any agency

or other institution, subject to any legislation affecting records, by the head of the class.

The director of the national records and archives institution is the head of the records class and is responsible for the posting of civil servants of the class in accordance with the relevant legislation.

The head of the records class is the appointing authority for all junior posts within the class (that is, the post of Trainee Records and Archives Clerk and Records and Archives Clerk). The public service commission (or equivalent) is appointing authorities for the more senior posts. The national records and archives institution is mainly staffed by officers of the records class, but it also includes other classes of general posts and departmental posts.

The director of the national records and archives institution, in his or her capacity as head of the records class, must be consulted when cases of disciplinary action arise affecting members of the records class who may be serving in agencies, regional bodies or district councils.

## FUNCTIONS OF THE RECORDS CLASS

The work of the records class covers a great variety of specific management tasks falling within the broad groups of records management units. Two types of skill are involved in this work, namely: the professional technical skills of records work; and the management skills associated generally with the work of the civil service, agencies and other institutions.

The mix of skills will vary according to the requirements of each post. On the technical side these range from the technician, through the sub-professional, to the full professional standard. On the operational side they range from the operative, through the supervisor standard, to the senior management level.

The professional staff within the records class consists of officers especially trained and qualified for records-related duties within agencies and other institutions. In general terms these duties demand the capability to

- design, manage and operate records management systems appropriate to the changing needs of government
- provide records management advice and specialist records management services to agencies, district councils and other appropriate organisations within the public sector.

The main classes of work undertaken by members of the records class are

- the control of the receipt and registration of records
- the maintenance of control records and registers
- the classification and filing of records

- the safeguarding, control and issue of records in the custody of agencies, district councils, records centres or archival institutions
- the preparation of indexes and other finding aids to facilitate retrieval of information and records
- the identification and retrieval of information held within records
- the management of subordinate staff
- the preparation and implementation of record disposal schedules
- the rehabilitation, repair, conservation and reproduction of records
- the design and implementation of appropriate records management systems and procedures.

In general the records class consists of three groups serving in

- the headquarters of the national records and archives institution
- regional and local bodies performing functions assigned to them under records legislation
- other records management units (such as records offices) in agencies and institutions subject to the provisions of the records legislation.

# COMPOSITION

The grade levels are as follows:

<b>Grade Number</b>	<b>Grade Title</b>
<b>Senior Posts</b>	
1	Director of Records and Archives
2	Deputy Director of Records and Archives
3	Assistant Director of Records and Archives
4	Records and Archives Officer
5	Assistant Records and Archives Officer
<b>Junior Posts</b>	
6	Records and Archives Supervisor
7	Records and Archives Clerk
8	Assistant Records and Archives Clerk

## Notes

1. In this model, grades are numbered top down. In some grading systems they are numbered bottom up, that is, with the Assistant Records and Archives Clerk at Grade 1, and so on.
2. In respect of the all grades, there will be a need to find appropriate links with general service grades in order to integrate the records grades into the existing pay and grading framework of any particular country. This may mean that the above grade numbers would be integrated at appropriate levels into an existing system, for example, the Director of Records and Archives might be Grade 3, and so on.
3. Grade titles are used here as generic terms and do not necessarily relate to grade titles already in use within the civil service in a particular country. Where the use of a particular title (such as Director of Records and Archives) would be taken to have such an intent and that is not intended, an alternative title (such as Head of Records and Archives Services) or a title intentionally specifying the appropriate grade (such as Director General ...) should be used.

# DUTIES

The duties of each grade have been identified for officers working in agencies, both within records offices and, for Assistant Records and Archives Officers, Records and Archives Officers, and Assistant Directors as supervisors or co-ordinators across an agency; and for officers working in the headquarters of the national records and archives institution. In respect of the latter, it has been assumed the organisation will be split into two divisions – current records and archives – and a general services division.

## **Assistant Records and Archives Clerk**

This is regarded as a training grade. Postholders work closely under the guidance of experienced Records and Archives Clerks and under the supervision of the Records and Archives Supervisor or Assistant Records and Archives Officer.

Some Assistant Records and Archives Clerks working in records offices are designated as Despatch Clerks, responsible for receiving, opening and acknowledging all incoming mail, sorting open and confidential mail, date stamping mail, recording details of letters in an inward mail register and placing mail in a folder for the attention of the Records and Archives Supervisor. They are also responsible for despatching all outgoing mail and circulating files, entering details of mail in the outward mail register and outgoing files on file transit sheets.

Most Assistant Records and Archives Clerks posted to records offices, however, spend their time performing the duties of Records and Archives Clerk under supervision, beginning with the more repetitive and routine tasks and gradually undertaking more complex tasks after training and as their competence and experience grow.

Assistant Records and Archives Clerks working in the archival division assist with boxing and arranging files, searching for documents, registering readers, ensuring that receipts are issued when files are issued to readers, photocopying documents and maintaining the cleanliness and orderliness of the shelves.

Assistant Records and Archives Clerks working in the current records division check draft lists of newly accessioned records from agencies to ensure compliance with editorial standards and prepare appropriate documentation to accompany records transferred to the records centre or the repository under the direct supervision of a Records and Archives Clerk or Records and Archives Supervisor.

## **Records and Archives Clerk**

Records and Archives Clerks working in records offices are responsible for receiving, classifying and filing incoming mail, creating new files as necessary under supervision, noting file minute sheets, despatching files to action officers and

recording details on transit sheets. They are responsible for ensuring that all files returning to the records office are noted on the transit sheets and for checking that all action on the files has been completed. This includes referring files to other officers if any action is outstanding or maintaining the 'bring up' (BU) diary. They are also involved in carrying out regular file censuses, assisting with the extraction and despatch of closed semi-current files to the records centre and maintaining mail folders, running files and so on.

Records and Archives Clerks working in the archival facility receive researchers and other visitors, assist with searching for documents, process the production tickets used to control the issue of documents to readers, chase up overdue loans from the records centre, secure unattached documents, box files, list the contents of the boxes and generally maintain the cleanliness and orderliness of the search and storage rooms. Those with appropriate technical training will repair documents, employing techniques such as guarding, sewing and binding or will be involved in the simpler processes of reproducing documents.

Records and Archives Clerks working in the current records division check draft lists of records proposed for accessioning from agencies to ensure compliance with editorial standards and prepare appropriate documentation to accompany records transferred to the records centre or the repository.

## **Records and Archives Supervisor**

The supervisory functions of Records and Archives Supervisors working in records offices include allocating duties to staff, ensuring that mail is properly and promptly filed, checking that records office procedures and standards are maintained and approving file titles and index headings or requesting permission from the Assistant Records and Archives Officer, Records Officer or Assistant Director of Records and Archives of the agency (depending on the size of agency) to introduce new index headings to the agency keyword list. They give technical advice and guidance to staff, propose formal training for staff and give them on-the-job training. They are expected to participate in the classification of new policy and case files and to assist with general filing duties. They answer enquiries from the public and from action officers and liaise regularly with action officers to determine their information requirements. Other responsibilities include maintaining sufficient stationery supplies and implementing rules for file retention, transfer to the records centre or disposal.

Records and Archives Supervisors working in the archival institution are responsible for supervising search-room services and for the day-to-day management of Assistant Records and Archives Clerks and Records and Archives Clerks. They are also responsible for the overall supervision of file and document accessions, listing, storage and retrieval processes. In addition, they are responsible for maintaining loans of records from the records centre and for ensuring the timely return of these documents. They maintain statistics of accessions to the records centre and the archival repository and of their use. They answer oral and written enquiries from the public that are likely to require some limited research and/or draw on the individual's developing speciality in order to provide an authoritative response. They provide



introductory talks to visitors on the holdings in the archival institution; undertake editorial work, either as principal or in support of senior colleagues, which requires some research but is conducted within a prescribed framework; conduct day-to-day supervision and control of the preparation of simple finding aids by junior colleagues.

Records and Archives Supervisors working in the current records division are responsible for providing day-to-day guidance and advice to departmental staff on record and records management matters. They are responsible for checking the arrangement of records before transfer to the records centre or the repository and adequate documentation has been provided. They are responsible for checking lists, explanatory notes and supplementary finding aids to ensure they meet general standards of format and layout and taking or instigating remedial action as required.

## **Assistant Records and Archives Officer**

Assistant Records and Archives Officers employed in the current records division assist the Records and Archives Officers in performing their duties as detailed below and are required to give advice to Records and Archives Officers and Records and Archives Supervisors within agencies on technical aspects of the filing systems and other records office procedures.

Assistant Records and Archives Officers working in the archival institution are involved in carrying out more complex searches for records, in preparing and updating more complex archival finding aids and in updating the guide to the national archives. They may also supervise the user services department or undertake more complex processes of day-to-day management of the archival facility's storage and handling department or the records centre. Assistant Records and Archives Officers who are appropriately trained may undertake document repair and reproduction.

Assistant Records and Archives Officers working within smaller agencies will be their records managers and as such will be responsible to an officer chosen by the appropriate senior manager for the supervision and co-ordination of the management of current records and other information resources in both headquarters and outstations. They are responsible for the maintenance of uniform standards across records offices in their agencies, co-ordinating file management and ensuring that there is no unnecessary duplication of effort. They report to an officer nominated by the head of their respective agencies and are responsible to him or her for the day-to-day smooth running of records office services. They are responsible for the deployment of staff between records offices and for providing relief staff for absences or to cover peaks of activity as they arise. They initiate and supervise the transfer of semi-current records to the records centre or disposal according to approved disposal schedules as appropriate. They are resource persons to assist with training staff formally and on the job and for giving advice and rulings on technical issues specific to the agency. They are responsible for liaising with representatives of the headquarters of the national records and archives institution.

## **Records and Archives Officer**

Records and Archives Officers are employed in both divisions and in large and medium-sized agencies.

Those employed in the current records division are responsible for inspecting all records offices within agencies on at least a fortnightly basis to ensure that the civil service systems of filing and file storage and retrieval are being applied properly. They are also responsible for scrutinising returns of new files created and for requests for the addition of new index headings to the ministerial keyword list or revisions to it. In addition, they are responsible for performing inspectorial functions, to ensure that systems are being adhered to, that storage arrangements are adequate and current disposal schedules are being observed. Postholders are also responsible for approving and co-ordinating transfers of files to the records centre.

Records and Archives Officers working in the archival institution are primarily concerned with the management of a department of the division. The departments are: records centre; archives storage and handling department; user services department; archival description department; and technical services.

Records and Archives Officers working in large and medium-sized agencies are responsible to the head of their organisation for the supervision and co-ordination of the management of current records and other information resources in both headquarters and outstations. They are responsible for the maintenance of uniform standards across records offices in their agencies, co-ordinating file management and ensuring that there is no unnecessary duplication of effort. They report to an officer nominated by the head of the organisation in their respective agencies and are responsible to him or her for the day-to-day smooth running of records office services. They are responsible for the deployment of staff between records offices and for providing relief staff for absences or to cover peaks of activity as they arise. They initiate and supervise the transfer of semi-current records to the records centre or disposal according to approved disposal schedules as appropriate. They are resource persons to assist with training staff formally and on the job and for giving advice and rulings on technical issues specific to the agency. They are responsible for liaison with representatives of the headquarters of the national records and archives institution.

## **Assistant Director of Records and Archives**

In major agencies, that is, those with large regional and district structures, an Assistant Director of Records and Archives will be responsible to the head of his or her organisation for the supervision and co-ordination of the management of current records and other information resources in both headquarters, regional and local offices and associated bodies. He or she is responsible for liaison with senior representatives of the headquarters of the national records and archives institution.

As head of the general services division, one Assistant Director of Records and Archives is responsible for manpower planning for the whole of the national record

administration or service, and for undertaking various internal responsibilities. The latter includes personnel and manpower planning; management of staff and day to day administration of financial resources; development, planning, organisation and implementation of the training services; and provision of support services including typing services, drivers, messengers, cleaning services, security services and maintenance staff.

## **Deputy Director of Records and Archives**

Head of the current records division, a Deputy Director of Records and Archives has overall responsibility for current records across the civil service: that is, staff development, the development, maintenance, monitoring and control of records office systems and the monitoring of ministerial keyword lists. He or she is responsible for ensuring, in consultation with the agency concerned, that records offices are adequately staffed and that the staff are adequately trained. In addition to responsibility for monitoring and controlling the professional performance of records offices through the scrutiny of returns and monitoring the approval of new files series and index headings, the post has an inspectorial function, which can be delegated, and involves a programme of inspections to ensure that systems are being adhered to, that storage arrangements are adequate and that current disposal schedules are being observed. The postholder is responsible for establishing and developing working relationships with and between departments in accordance with agreed policy and priorities. The postholder is also responsible for liaising with the head of the archival institution over the transfer of files to the records centre. He or she can deputise for the Director of Records and Archives for the national records and archives institution.

As head of the archival facility, a Deputy Director of Records and Archives is responsible for overseeing the operations of the records centre and archival repositories, ensuring that transfers to the records centre and to archives storage and handling departments conform with current disposal policies, that incoming files are listed and stored appropriately and that requisitions are handled expeditiously. He or she ensures that duties in the user services department, registration of readers, issue of documents to and from researchers and recovery of overdue documents from agencies to the records centre are carried out efficiently. The postholder is responsible for the development of the editorial programme and for liaising with the head of the current records division over the transfer of closed semi-current files to the records centre. The postholder is responsible for leading and developing working relationships with established user groups in accordance with agreed policy and priorities. He or she is responsible for providing on the job training for staff in his or her command. The postholder can deputise for the Director of Records and Archives for the national records and archives institution.

## **Director of Records and Archives**

The Director of Records and Archives for the national records and archives institution as Head of the Records Class, reports ideally to the headquarters of the head of state (or equivalent) or to an appropriate agency. The Director of Records and Archives carries out the powers assigned to him under the relevant legislation and has responsibility for the overall direction, administration and development of the national records and archives institution. He or she sets policies for the management of records in every phase of the record cycle, ensuring that careful consideration is given to the effects of policies for the management of current records or semi-current records and archives and vice versa. The postholder is responsible for setting the overall standards for systems and procedures which will ensure a high quality of service for users of records. He or she scrutinises returns and carries out regular visits and surveys to confirm the level of performance within the service. The postholder has overall responsibility for the management, training and development of records staff in order to achieve effective records management systems and procedures. He or she makes budgetary provisions for the national records and archives institution and regularly advises the national records advisory council of which he or she is a member, as to its performance.

## **ENTRY QUALIFICATIONS AND CAREER PROGRESSION**

### **Assistant Records and Archives Clerk**

#### **Direct Entry**

Candidates for direct entry to the grade must possess a minimum of 4 GCE 'O' level passes, including English and mathematics (or equivalent, such as a school certificate).

## **Records and Archives Clerk**

### **Direct Entry**

For direct appointment to this grade, candidates must have obtained GCE credits in five subjects, at least two of which must be at 'A' level.

### **In-service Entry**

Minimum of three years' satisfactory service as an Assistant Records and Archives Clerk, having obtained a promotion marking in his or her annual staff report and successfully completed prescribed training.

## **Records and Archives Supervisor**

### **In-service Entry**

Minimum of three years' satisfactory service in the grade of Records and Archives Clerk, a recommendation for promotion in his or her latest annual staff report and having successfully completed the prescribed training for the grade.

## **Assistant Records and Archives Officer (Non-Graduate Diplomat Entry Point)**

### **Direct Entry**

Candidates for appointment to this grade must have obtained a diploma in record and archive management from an appropriate institution.

### **In-service Entry**

Minimum of three years as a Records and Archives Supervisor, having successfully completed prescribed training and obtained a recommendation for promotion in his or her latest annual staff report.

## **Records and Archives Officer (Graduate Entry Point)**

### **Direct Entry**

For direct entry to this grade, candidates must have a first degree from a recognised University, preferably with a post-graduate qualification in records and archives management.

### **In-service Entry**

Assistant Records and Archives Officers with at least four years' satisfactory service, having as a minimum, achieved a recommendation for promotion in their latest annual staff reports, and successfully completed prescribed training.

## **Assistant Director of Records and Archives**

These posts are for Records and Archives Officers who have served at least four years and who have achieved a recommendation for promotion in his or her last annual staff report. Preferably they should have obtained a post-graduate qualification in records and archives management.

## **Deputy Director of Records and Archives**

These are posts open to Assistant Directors of Records and Archives who have completed at least four years' satisfactory service and who have achieved a recommendation for promotion in his or her latest annual staff reports. They must have received appropriate professional training in records management.

## **Director of Records and Archives**

The holder of this post will normally be appointed by the Head of the Civil Service on the advice of the Public Service Commission (or equivalent).

## **TRAINING**

Training should be carried out in-country, wherever possible, in recognised institutions such as a Civil Service Training Centre or university as well as in-house. For professional training which is not available in-country arrangements should be made for training abroad, consistent with the needs of the work and of the individual, in consultation with any central personnel or training ministries.

Whilst the completion of specific training will not necessarily lead to promotion, the successful completion of relevant management and professional training will normally be taken into account in the promotion process.

The opportunity may also be taken to enhance individuals' skills through exposure to a different environment; for example, by secondment to commerce, industry or other public sector bodies. All direct entrants will receive induction training.

## **Assistant Records and Archives Clerk**

Postholders will receive induction and technical training in records office and archives procedures and practices in-house and at institutions such as a civil service training centre. Thereafter, training will be given on the job.

## **Records and Archives Clerk**

Direct entrants will receive induction and basic records office/archival training in-house and at institutions such as a civil service training centre. Other training will be given on the job.

## **Records and Archives Supervisor**

Records and Archives Supervisors will receive technical and supervisory training at institutions such as a civil service training centre.

## **Assistant Records and Archives Officer**

Professional and management training will be undertaken at the institutions such as a university or institute of public administration. Postholders may participate in in-country or overseas record management workshops.

## **Records and Archives Officer**

Most officers at this level will receive professional and management training at an institution such as a university or institute of public administration. Depending on the needs of the work and the capacity of the individual, a few Records and Archives Officers may be sent for advanced training in records management overseas. Records and Archives Officers may also attend records management workshops at home and abroad.

## **Assistant Director of Records and Archives**

Postholders will undertake such professional and management training as is necessary to maintain and develop their expertise.

## **Deputy Director of Records and Archives**

Postholders will attend management training courses at institutions such as a university or institute of public administration. They may also participate in short workshops.

## **Director of Records and Archives**

The postholder will attend seminars, conferences and workshops in order to be aware of developments within the records management field, and in senior management techniques.