

## Update

Ministry

**Describe: Basic Job Details****Position**

Position ID

Position Name (200 character maximum)

Current Class

Job Focus

Supervisory Level

Agency (ministry) code

Cost Centre

Program Code: (enter if required)

**Employee**

Employee Name (or Vacant)

**Organizational Structure**

Division, Branch/Unit

 Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

Supervisor's Current Class

**Design: Identify Job Duties and Value****Changes Since Last Reviewed**

Date yyyy-mm-dd

Responsibilities Added:

Added responsibilities include:

1. Business Analysis- define and validate requirement for new litigation matters and affected programs, asses impacts to existing service delivery models, recommending solutions to create positive and improve user experience, reducing administrative burden, and enabling sustainable information discovery processes, including collections and preservations.
2. Project leadership- plan, develop, coordinate and monitor end to end discovery activities, using sound project management practices to deliver timely, high-quality, and value-added outcomes.
3. Service modernization- advance adoption of automation, artificial intelligence, and workflow integration to strengthen defensible processes, increase efficiency and improve service consistency across departments.

Responsibilities Removed:

None

## Job Purpose and Organizational Context

Why the job exists:

The Enterprise Content Management (ECM) Branch provides cost effective and responsive records and information management services across the Government of Alberta (GoA). Reporting to the Manager, Active File Management, the Senior Information Discovery Lead provides professional leadership for the delivery, modernization and continuous improvement of Information Discovery Services that support GoA legal counsel and departments. Information Discovery enables the defensible identification, preservation, collection, and production of relevant information for litigation, inquiries, and other evidence-based processes, while maintaining traceability, security, and compliance with applicable directives, standards, and timelines.

## Responsibilities

Job outcomes (4-6 core results), and for each outcome, 4-6 corresponding activities:

1. Lead service delivery and team coordination for Information Discovery across assigned matters.
  - Set priorities and allocate work and resources to meet legal timelines and service level commitments.
  - Coach and support staff on standards, policies, procedures, tools and defensible practices, identify training needs and enable continuous skill development.
  - Provide regular operational reporting to management on a daily/weekly basis or as required;
  - maintain awareness of evolving discovery trends, information management emerging technologies and practices
  - Translate changes into updated and documented guidance for the team.
2. Monitor quality control, compliance and defensibility of discovery processes and outputs.
  - Develop, maintain and improve standardized procedures, templates and quality controls such as, custodian identification, collection approaches, production and communication plans.
  - Monitor adherence to policies, directives and standards
  - Evaluate effectiveness of current approaches and implement improvements
  - Assess impacts of technology changes on traceability, security, and storage and or tracking practices, recommend mitigation and controls.
  - Contribute to service definitions, performance measures and operational planning inputs for ECM/AFM.
3. Provide expert Information discovery consultation and advice to departments and legal stakeholders as required.
  - Build and maintain effective working relationships with legal counsel, department representatives, and service partners in accordance with applicable discovery directives and guidance.
  - Translate legal and business requirements into clear discovery plans, expectations, and deliverables, ensure complete and accurate information is delivered.
  - Deliver awareness and training sessions (presentations) on information discovery requirements, processes, and responsibilities, in collaboration with management.
  - Evaluate issues, propose options, and escalate risks or barriers appropriately to protect timelines and defensibility.
4. Plan and manage information discovery execution using enterprise tools and repeatable methods.
  - Oversee information discovery searches and case activities in M365 Compliance/eDiscovery and related tools, ensure appropriate use of advanced search techniques, such as scoping, deduplication where required.
  - Support or lead creation of repeatable, documented processes for test and production environments, including holds, search strategy and case management.

- Develop training materials, user procedures, and knowledge articles to support consistent execution and adoption.
  - Identify and implement continuous improvement opportunities within processes and procedures to ensure alignment with changing business environments, such as technology evolution, organizational transitions, and operational requirements, utilizing AI and RPA tools within governance and risk control
5. Coordinate preservation, collection, transfer and secure handling of responsive content.
- Guide application of legal holds and preservation requirements to prevent inadvertent disposition of relevant information.
  - Coordinate and document defensible collection and transfer of content and metadata to approved secure locations.
  - Working with other staff in the Test environment to develop a repeatable process that will be used in the production environment;
  - Develop processes for searching all accounts (email, SharePoint sites, Team sites, One Drive for Business) which may include use of advanced search terminology, de-duplication, etc.
  - Additional processes will identify how to apply holds to information identified through M365 eDiscovery to ensure that relevant information is not inadvertently dispositioned; and
  - Ensure clear collaboration and documentation for all relevant team members, both in test and production environments, escalate incidents through management channels and support follow up actions
6. Lead continuous improvement, and modernization outcomes to strengthen sustainability and reduce administrative burden.
- Perform business analysis to define and validate requirement for new litigation matters and affected program, assess impacts to service delivery.
  - Apply project management practices such as work plans/project charters, risk management, compliance monitoring and reporting, to deliver high quality outcomes.
  - Promote adoption of innovative approaches, including automation, artificial intelligence, and workflow integration, to improve efficiency and user experience.
  - Work with team to assess technology initiatives and changes that affect discovery process and business requirements.
  - Identify and implement continuous improvement opportunities to keep processes aligned with evolving technology, organizational transitions, and operational requirements.

## Problem Solving

Typical problems solved:

The Senior Info. Discovery Lead will need to adapt to the changing business environment where direction, scope, requirements, stakeholders, technology and business partners may have changed and can affect on going litigation, therefore continuous communication and having up-to-date information is critical.

Where litigation is historical, complex, and involving multiple departments so that information is widely held, the identification, preservation and production can be difficult, coupled with departments maturity levels in the management of their information. The Team Lead has to be skilled in order to work with the team and relevant stakeholders to find ways of narrowing search criteria through collaboration for project planning, execution and control, ability to connect effectively with subject matter experts, be able to produce relevant information, avoiding delays and risks to the legal case.

Difficulty getting responses from business partners within time lines is common, the Team Lead must work with the team to escalate when needed to ensure that timelines are met.

Types of guidance available for problem solving:

Access to project managers, subject matter experts and analysts who perform similar functions, EMC management, legal counsel and FOIP coordinators.

Access to up-to-date standards, policies and procedures.

Training: Mandatory GoA Noverant courses, 1GX training, BERNIE training, M365 training, etc.

Direct or indirect impacts of decisions:

Evidence is being provided to support government cases in court of law. Impact can be large if relevant information is missed or not provided. The evidence provided must be considered privileged and may not be discussed or shared outside of the team working on the discovery case.

### Key Relationships

Major stakeholders and purpose of interactions:

Assistant Deputy Minister, Executive Directors from program areas identified for information discovery; staff from targeted program areas; legal counsel; technical; staff; other staff from DIRS branch, Content Transfer Team or Cyber Security Office; DMO or Chief of Staff; Legal Counsel and other staff from Department of Justice and Solicitor General; information management professionals including information management portfolio managers and directors; Content Transfer Services staff; Messaging Team, etc. The purpose of the interactions is to ensure a defensible process in court.

### Required Education, Experience and Technical Competencies

Education Level	Focus/Major	2nd Major/Minor if applicable	Designation
Bachelor's Degree (4 year)	Other		

If other, specify:

Library and Information Studies, Certified Records Manager or equivalent

Job-specific experience, technical competencies, certification and/or training:

- Considerable knowledge and experience in litigation including managing holds, information management, project management, records management and content management;
- Knowledge and experience with search tools used in GoA;
- Knowledge on how to use the M365 compliance center/eDiscovery and collaboration skills to support staff who will be also using the advanced search tools;
- Relevant legislation, policies, and standards governing the digitization and unitization, including how they are interpreted and applied in practice
- High level communication skills (including presentations) are required to create effective working relationships and produce relevant information. The Team Lead is required to collaborate and communicate clearly within the Information Discovery Services team and the ECM teams at large;
- 1GX training courses such as 1MX101 Managing My Employees' Data in 1GX, 1MX701 Recruitment and Onboarding for Managers, 1MX201 Managing and Employee's Exit, Supervisory training, etc.

### Behavioral Competencies

Pick 4-5 representative behavioral competencies and their level.

Competency	Level					Level Definition	Examples of how this level best represents the job
	A	B	C	D	E		
Creative Problem Solving	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Engages the community and resources at hand to address issues: <ul style="list-style-type: none"><li>• Engages perspective to seek root causes</li><li>• Finds ways to improve complex systems</li><li>• Employs resources from other areas to solve problems</li><li>• Engages others and encourages debate and idea generation to solve problems while addressing risks</li></ul>	<ul style="list-style-type: none"><li>- Able to analyze a problem, get to the root cause and devise methods for continuous improvement</li><li>- Learns from each experience and adds/ adapts work methods for the team as needed</li><li>- Must be analytical and inquisitive enough to work with the team to provide targeted search results</li><li>- Must be able to share methodologies with the</li></ul>

			larger team and learn from other's work
Agility	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Identifies and manages required change and the associated risks:</p> <ul style="list-style-type: none"> <li>• Identifies alternative approaches and supports others to do the same</li> <li>• Proactively explains impact of changes</li> <li>• Anticipates and mitigates emotions of others</li> <li>• Anticipates obstacles and stays focused on goals</li> <li>• Makes decisions and takes action in uncertain situations and creates a backup plan</li> </ul>	<ul style="list-style-type: none"> <li>- Able to adapt to changing information controllers and information custodians needs</li> <li>- Able to adapt and adjust to scope changes for the initial ask, including changes in time lines</li> <li>- Able to find creative solutions and work with others to see these through to production of collected relevant records</li> </ul>
Drive for Results	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Takes and delegates responsibility for outcomes:</p> <ul style="list-style-type: none"> <li>• Uses variety of resources to monitor own performance standards</li> <li>• Acknowledges even indirect responsibility</li> <li>• Commits to what is good for Albertans even if not immediately accepted</li> <li>• Reaches goals consistent with APS direction</li> </ul>	<ul style="list-style-type: none"> <li>- Must engage stakeholders and lead the team to achieve results within time frames provided by legal counsel</li> <li>- Devises plans based on experience, processes to meet or exceed time lines</li> <li>- Performance manage staff to meet results based on their performance agreements and work collaboratively with the Manager</li> </ul>
Systems Thinking	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Takes a long-term view towards organization's objectives and how to achieve them:</p> <ul style="list-style-type: none"> <li>• Takes holistic long-term view of challenges and opportunities</li> <li>• Anticipates outcomes and potential impacts, seeks stakeholder perspectives</li> <li>• Works towards actions and plans aligned with APS values</li> <li>• Works with others to identify areas for collaboration</li> </ul>	<ul style="list-style-type: none"> <li>- Visualizes how the work performed by the eDiscovery services team aligns with the objectives of the GoA as a whole</li> <li>- Works to collaborate with a large group of stakeholders across the GoA</li> <li>- Regularly engages AFM management to provide feedback or ask clarifying questions</li> <li>- Awareness of broader EMC's alignment with information discovery</li> </ul>