

Department: County Assets

Program Contact: Garret Vanderzanden

Program Offer Type: Internal Service

Program Offer Stage: As Requested

Related Programs:
Program Characteristics: In Target

Executive Summary

Records Management supports County agencies and the public by maintaining public records in accordance with operational, legal, fiscal, public access and historic preservation needs.

Program Summary

The program supports cost reduction and compliance with public records regulations by developing and implementing policies for the orderly maintenance and disposition of county records generated by all departments. Addressing a wide variety of formats, the program maintains over 116 millions documents in a centralized Records Center, including the County's historic archives dating back to 1855. Storage of these records reduced the need for office space storage by over 53,000 square feet in FY2013.

The program also recycles large volumes of public records (83 tons in FY2013) in a sustainable manner that ensures confidentiality. The program provides consultation in the establishment and organization of electronic records keeping methods and systems; enterprise document conversion; retention scheduling; archival research, access and preservation; essential records protection; and records management best practices.

The program continues to expand its web presence with the Archon web tool and external web site, resulting in a 70% increase in reference and referral activities in FY2013. Significant progress has been made in managing electronic records through the establishment of a county electronic records repository, and through increasing e-records training and consultation. The program will expand its ability to manage electronic records throughout the county through implementation of the HP RM Electronic Records Management System (ERMS) that will replace the program's current antiquated system, provide end user access to records stored in the system, and provide public access to digitized and born digital archival content. This ERMS system will also aid in establishing methods for quantifying digital objects in storage in comparison to physical objects (this was removed as part of the Storage performance measure for FY2015 while it is being developed).

These efforts contribute to the Climate Action Plan activities related to local government operations, item number 18-8, due to large amount of paper recycling the program does each year, and due to its ongoing consultation with Departments on ways to increase their use of reliable, retention and preservation compliant, and trusted electronic records systems.

Performance Measures

| Measure Type | Primary Measure | FY13 Actual | FY14 Purchased | FY14 Estimate | FY15 Offer |
|--------------|---|-------------|----------------|---------------|------------|
| Output | Number of Retrieval, Refiles, and Interfiles (Record Actions) performed | 10,644 | 13,000 | 11,000 | 11,000 |
| Outcome | Percentage Increase of Reference and Referral Requests Compared to Previous Fiscal Year | 70% | 0 | 55% | 58% |
| Output | Number of Boxes, Microfilm Rolls, Maps and Plans Maintained in Storage | 93,175 | 89,000 | 93,500 | 93,500 |

Performance Measures Descriptions

Previous performance measure "Percentage of Archival Collections Described Online" replaced with "Percentage Increase of Reference and Referrals Compared to Previous Fiscal Year". Number includes in person, telephone, and online interactions. New performance measure is a more relevant statistic, demonstrating increased use of program over time by internal County staff and the public.

Legal / Contractual Obligation

ORS 192 and OAR 166 outline public records mandates for the Records Officer, microfilm, imaging, storage, retention and access. Executive Rule 301 assigns the retention schedule function to the Records Management program.

Revenue/Expense Detail

| | Proposed General Fund | Proposed Other Funds | Proposed General Fund | Proposed Other Funds |
|------------------------|-----------------------|----------------------|-----------------------|----------------------|
| Program Expenses | 2014 | 2014 | 2015 | 2015 |
| Personnel | \$0 | \$382,148 | \$0 | \$409,642 |
| Contractual Services | \$0 | \$32,757 | \$0 | \$25,000 |
| Materials & Supplies | \$0 | \$25,365 | \$0 | \$36,392 |
| Internal Services | \$0 | \$423,887 | \$0 | \$432,532 |
| Total GF/non-GF | \$0 | \$864,157 | \$0 | \$903,566 |
| Program Total: | \$864,157 | | \$903,566 | |
| Program FTE | 0.00 | 3.60 | 0.00 | 4.20 |

| Program Revenues | | | | |
|-----------------------|------------|------------------|------------|------------------|
| Other / Miscellaneous | \$0 | \$864,157 | \$0 | \$903,566 |
| Total Revenue | \$0 | \$864,157 | \$0 | \$903,566 |

Explanation of Revenues

Records Management is funded by an allocation system through the Distribution Fund. Total program costs are allocated based on each Department's share of the number of boxes stored, boxes brought into the Records Center (accessioned), and record actions performed in FY2013.

Significant Program Changes

Last Year this program was: 78033 Records Management

No significant program changes.