Program #78404 - Records Management — 6/19/2017

Department:	County Assets	**Program Contact:**	Garret Vanderzanden
Program Offer Type:	Internal Service	**Program Offer Stage:**	As Adopted
Related Programs:			
Program Characteristics:			

Executive Summary

The Records Management program provides a full suite of records services. Managing and safeguarding the information assets of the County through identification, classification, appraisal, storage, tracking, digital preservation planning, and confidential destruction.

Program Summary

Records Management is the professional practice of managing records throughout their life cycle, a series of discrete phases that carries a record from creation to destruction. This work includes identifying, classifying, appraising, storing, securing, preserving, retrieving, tracking, and disposing of County records in accordance with State and Federal retention and privacy regulations and industry best practices. The program provides a full suite of records services, including planning for the management and safeguarding of the information assets of the County, regardless of digital or analog format, in compliance with Oregon Administrative Rule 166-030-0016.

The program is staffed by an information scientist (data analyst senior), two professional records managers/archivists (program specialists) and two records administration assistants. The data analyst senior also serves as the Records Officer, fulfilling a state-mandated role, and also functioning as the lead worker.

The primarily functions of the program include, but are not limited to:
- Administration of HP Records Manager (HPRM), an electronic document and records management system, including implementation and maintenance of user accounts in other county agencies for use as a system for document management and inactive electronic records storage;
- Records Center services, including storage/retrieval of inactive records and secure destruction of physical records;
- Historic archives development and preservation, including research and reference services for customers within and outside of the County;
- Retention scheduling across all departments, as required by state and federal regulation, and by County code;
- Records management consulting and training; and
- Locating Records services, primarily through the program's public facing website.

These efforts contribute to the Climate Action Plan activities related to local government operations, item 19G, due to ongoing consultation with other programs to enable use of retention- and preservation-compliant electronic records systems.

Performance Measures

Measure Type	Primary Measure	FY16 Actual	FY17 Purchased	FY17 Estimate	FY18 Offer
Output	Number of Records Retrievals and Interfiles (Record Actions) Performed on Behalf of Customers	3973	5000	4618	4300
Outcome	Percentage Increase of Reference and Referral Requests Compared to Previous Fiscal Year	2.83%	30.0%	-6.61%	10.00%
Output	Cubic Feet of Boxes, Microfilm Rolls, Maps and Plans Maintained in Records Center and Archives	54,789	55,202	61,335	60,000

Performance Measures Descriptions

PM #1 Output: Record actions remain relatively stable.
PM # 2: Combination of in-person, telephone, and website statistics.
PM #3: Physical Records Center holdings expected to decrease, and historic archives and e-records to increase.

ORS 192 and OAR 166 outline public records mandates for the Records Officer, microfilm, imaging, storage, retention, access and disposition. Executive Rule 301 assigns the retention schedule function to the Records Management program. Chapter 8.500 of the County Code defines additional responsibilities and obligations of the Records Management program.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	**2017**	**2017**	**2018**	**2018**
Personnel	$0	$509,516	$0	$503,840
Contractual Services	$0	$31,500	$0	$54,850
Materials & Supplies	$0	$37,450	$0	$69,405
Internal Services	$0	$496,467	$0	$603,176
Capital Outlay	$0	$75,896	$0	$222,173
Unappropriated & Contingency	$0	$60,570	$0	$0
Total GF/non-GF	**$0**	**$1,211,399**	**$0**	**$1,453,444**
Program Total:	**$1,211,399**		**$1,453,444**	
Program FTE	0.00	5.20	0.00	5.20

Program Revenues				
Other / Miscellaneous	$0	$1,073,399	$0	$1,061,133
Beginning Working Capital	$0	$138,000	$0	$392,311
Total Revenue	**$0**	**$1,211,399**	**$0**	**$1,453,444**

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 FY2016.

Significant Program Changes

Last Year this program was: FY 2017: 78404 Records Management

Increase in capital equipment expenditures and HPRM software licenses.