

Program #78404 - Records Management

Program Contact: Garret Vanderzanden

Department: County Assets

Program Offer Type: Program Offer Stage: As Requested Internal Service

Related Programs:

Program Characteristics: In Target

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 primary functions of the program include, but are not limited to:

- Administration of Content Manager, 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	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer			
Output	Number of Records Retrievals and Interfiles (Record Actions) Performed on Behalf of Customers	2,553	4,300	3,000	4,300			
Outcome	Percentage Increase of Reference and Referral Requests Compared to Previous Fiscal Year	-3.66%	10.0%	-10.15%	5.00%			
Output	Cubic Feet of Boxes, Microfilm Rolls, Maps and Plans Maintained in Records Center and Archives	61,335	60,000	55,667	55,000			

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.

2/21/2018

Legal / Contractual Obligation

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	2018	2018	2019	2019	
Personnel	\$0	\$503,840	\$0	\$639,767	
Contractual Services	\$0	\$54,850	\$0	\$26,761	
Materials & Supplies	\$0	\$69,405	\$0	\$117,831	
Internal Services	\$0	\$603,176	\$0	\$727,665	
Capital Outlay	\$0	\$222,173	\$0	\$0	
Total GF/non-GF	\$0	\$1,453,444	\$0	\$1,512,024	
Program Total:	\$1,45	\$1,453,444		\$1,512,024	
Program FTE	0.00	5.20	0.00	5.20	

Program Revenues							
Other / Miscellaneous	\$0	\$1,061,133	\$0	\$1,277,794			
Interest	\$0	\$0	\$0	\$3,300			
Beginning Working Capital	\$0	\$392,311	\$0	\$230,930			
Total Revenue	\$0	\$1,453,444	\$0	\$1,512,024			

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 FY2017.

Significant Program Changes

Last Year this program was: FY 2018: 78404 Records Management