

Department: County Assets
Program Offer Type: Internal Service

Program Contact: Lisa Whedon
Program Offer Stage: As Requested

Related Programs:

Program Characteristics: In Target

Executive Summary

The Records Management program provides services, tools, training, and professional consultation to County agencies to support the compliant creation, management, storage, retrieval, accessibility, protection, preservation, and secure destruction of public records. The program also leads countywide strategic Information Governance initiatives to maximize information's value in decision-making, minimize risk, protect rights, and ensure policies and procedures meet legal and regulatory requirements.

Program Summary

Public records document the County's policies, decisions, functions, and efforts to fulfill its mission. Agencies create, receive, manage, use, and destroy public records in their daily work as they provide essential services. The Records Management program directly supports agencies in their work by providing services, tools, training, and consultation to ensure that these records are classified, stored, retrieved, protected, preserved, and archived or destroyed in accordance with all applicable State, Federal, and regulatory retention, privacy, and public records laws and industry best practices.

Primary program functions include, but are not limited to:

- Records Center services including storage, protection, and retrieval of inactive records and secure destruction of physical records and media;
- Administration of Content Manager, an electronic document and records management system, including implementation and maintenance of user accounts for County agencies to use as a system for document management and inactive electronic records storage;
- General electronic records management services including file classification, digital records preservation, and guidance in managing records and information across multiple locations outside of Content Manager such as shared drives, third-party applications, G Suite, and mobile devices;
- Retention schedule management to ensure users meet all legal and regulatory requirements for retaining public records;
- Continuity of Operations and Disaster Recovery support through the identification and management of essential records;
- Archival reference and research services, public outreach, and the promotion of the significance of public records in equity and inclusion;
- Locating Records services to assist the community in obtaining public records held by non-county agencies.
- Facilitation and support of scanning and shredding projects and services through the management of the County's Digitization, Microfilm, and Secure Destruction contracts;
- Implementation and management of countywide Information Governance initiatives.

Performance Measures

Measure Type	Primary Measure	FY18 Actual	FY19 Purchased	FY19 Estimate	FY20 Offer
Output	Number of Records Retrievals and Interfiles (Record Actions) Performed on Behalf of Customers	2,553	4,300	3,082	4,300
Outcome	Percentage Increase of Reference Requests Compared to Previous Fiscal Year	-22.00%	5.00%	48.00%	10.00%

Performance Measures Descriptions

PM #1: Record actions remain relatively stable.
 PM #2: Based on number of discrete requests.

Legal / Contractual Obligation

Oregon Revised Statute 192 and Oregon Administrative Rule Chapter 166 define public records policy, Records Officer mandates, and standards and obligations for records creation, access, storage, protection, retention, and disposition. Multnomah County Executive Rule 301 assigns the retention schedule function to the Records Management program, and Multnomah County Code Chapter 8.500 defines additional archival records responsibilities and obligations.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2019	2019	2020	2020
Personnel	\$0	\$639,767	\$0	\$670,029
Contractual Services	\$0	\$26,761	\$0	\$275,165
Materials & Supplies	\$0	\$117,817	\$0	\$128,172
Internal Services	\$0	\$727,665	\$0	\$844,134
Capital Outlay	\$0	\$0	\$0	\$57,527
Total GF/non-GF	\$0	\$1,512,010	\$0	\$1,975,027
Program Total:	\$1,512,010		\$1,975,027	
Program FTE	0.00	5.20	0.00	5.00

Program Revenues				
Other / Miscellaneous	\$0	\$1,277,780	\$0	\$1,789,136
Interest	\$0	\$3,300	\$0	\$0
Beginning Working Capital	\$0	\$230,930	\$0	\$185,891
Total Revenue	\$0	\$1,512,010	\$0	\$1,975,027

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 FY2018.

Significant Program Changes

Last Year this program was: FY 2019: 78404-19 Records Management

In FY20, the program will be responsible for shredding services for the County. Previously this was managed by the FPM Division within DCA.