

**Department:** County Assets

**Program Contact:** Lisa Whedon

**Program Offer Type:** Internal Service

**Program Offer Stage:** As Proposed

**Related Programs:**
**Program Characteristics:**

### 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 and supports countywide strategic initiatives to maximize information's value in decision-making, minimize risk, protect rights, and ensure policies and procedures meet legal and regulatory requirements, and provides research access to historic records dating back to 1855.

### 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, a countywide system for appropriate and compliant management of active and inactive electronic records, and Preservica, a long-term digital preservation system that preserves and makes available electronic records of enduring value;
- General electronic records management services including file classification and guidance in managing records and information across multiple locations 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 of scanning and shredding 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	FY19 Actual	FY20 Budgeted	FY20 Estimate	FY21 Offer
Output	Number of Records Retrievals and Interfiles (Record Actions) Performed on Behalf of Customers	3,039	4,300	3,900	4,000
Outcome	Percentage Increase of Reference Requests Compared to Previous Fiscal Year	48.00%	10.00%	-8.00%	5.00%

### 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 law and 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

	Adopted General Fund	Adopted Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2020	2020	2021	2021
Personnel	\$0	\$700,186	\$0	\$741,176
Contractual Services	\$0	\$300,411	\$0	\$318,184
Materials & Supplies	\$0	\$124,998	\$0	\$178,647
Internal Services	\$0	\$841,067	\$0	\$769,036
Capital Outlay	\$0	\$27,370	\$0	\$242,357
<b>Total GF/non-GF</b>	<b>\$0</b>	<b>\$1,994,032</b>	<b>\$0</b>	<b>\$2,249,400</b>
<b>Program Total:</b>	<b>\$1,994,032</b>		<b>\$2,249,400</b>	
<b>Program FTE</b>	0.00	5.00	0.00	5.00

Program Revenues				
Other / Miscellaneous	\$0	\$1,783,615	\$0	\$2,067,764
Beginning Working Capital	\$0	\$210,417	\$0	\$181,618
Service Charges	\$0	\$0	\$0	\$18
<b>Total Revenue</b>	<b>\$0</b>	<b>\$1,994,032</b>	<b>\$0</b>	<b>\$2,249,400</b>

## 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 FY2019.

## Significant Program Changes

Last Year this program was: FY 2020: 78404-20 Records Management