



**Program #78404 - Records Management** FY 2024 Department Requested

**Department:** County Assets **Program Contact:** Lisa Whedon  
**Program Offer Type:** Internal Service **Program Offer Stage:** Department Requested  
**Related Programs:**  
**Program Characteristics:** In Target

**Executive Summary**

This program serves the public by providing 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 leads, supports, and promotes countywide strategic initiatives that use information to minimize risk, protect rights, and in equitable decision-making. The program strives to remove barriers to access to 165 years of the County's legacy of decision-making and community impacts, and promotes the role of records in advancing equity.

**Program Description**

The program's goal is to ensure that all members of the public are able to inspect county public records as mandated by Oregon Public Records Law, and that the departments creating, managing, protecting, and destroying public records do so in a manner that retains their authenticity, integrity, and reliability as documentation of our County's decision-making, policies, and community involvement.

Public records document the County's policies, decisions, functions, and efforts to fulfill its mission. This program preserves these records by providing specialized storage and handling for hard copy records in the Archives, and preserving electronic records in the County's Digital Archives, a dedicated long term digital preservation system.

The public has direct access to historic records through in-person research appointments, 24/7 online access to digital records, and phone and email referrals for non-county public records. This program makes efforts to remove barriers to access by: writing finding aids (tools for locating records) that employ inclusive language metadata schemas; reducing bias in collections management through a team approach to appraisal, and applying plain language and digital accessibility best practices to online portals.

Departments create and use records to provide critical services to the community. This program provides tools, training, and consultation to support departments in balancing service delivery needs with public records law compliance by: maintaining the County's retention schedules; providing Records Center storage and retrieval services (allowing programs to prioritize office space for serving clients); facilitating digitization projects to support continuity of service and employees' ability to go directly to clients in the field; managing and promoting use of the County's enterprise electronic document and records management system, and providing secure destruction of individuals' protected information at the end of its lifecycle.

**Performance Measures**

Measure Type	Primary Measure	FY22 Actual	FY23 Budgeted	FY23 Estimate	FY24 Offer
Output	Number of Records Retrievals and Interfiles (Record Actions) Performed on Behalf of Customers	1,779	1,300	2,272	2,500
Outcome	Percentage Increase of Reference Requests Compared to Previous Fiscal Year	56%	30%	-20%	25%
Output	Number of New EDRMS Users Onboarded	46	100	64	100
Outcome	Number of Public Sessions Initiated in the Digital Archives	2,307	2,250	2,600	2,750

**Performance Measures Descriptions**

- PM #1 - Record actions indirectly impacted by departments directly impacted by changing Oregon legislation.
- PM #2 - Based on number of discrete requests. Anticipated to increase to or exceed pre-COVID levels.
- PM #3 - Electronic document & records management system (EDRMS) use reduces individuals' records compliance burden.
- PM #4 - Measures public enaaement with the diaital archives.

## 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	Department Requested General Fund	Department Requested Other Funds
<b>Program Expenses</b>	<b>2023</b>	<b>2023</b>	<b>2024</b>	<b>2024</b>
Personnel	\$0	\$832,188	\$0	\$941,107
Contractual Services	\$0	\$326,859	\$0	\$343,072
Materials & Supplies	\$0	\$155,749	\$0	\$153,919
Internal Services	\$0	\$883,263	\$0	\$969,753
Capital Outlay	\$0	\$140,003	\$0	\$291,372
<b>Total GF/non-GF</b>	<b>\$0</b>	<b>\$2,338,062</b>	<b>\$0</b>	<b>\$2,699,223</b>
<b>Program Total:</b>	<b>\$2,338,062</b>		<b>\$2,699,223</b>	
<b>Program FTE</b>	0.00	6.00	0.00	6.00

<b>Program Revenues</b>				
Other / Miscellaneous	\$0	\$2,097,593	\$0	\$2,407,397
Beginning Working Capital	\$0	\$240,167	\$0	\$291,372
Service Charges	\$0	\$302	\$0	\$454
<b>Total Revenue</b>	<b>\$0</b>	<b>\$2,338,062</b>	<b>\$0</b>	<b>\$2,699,223</b>

## Explanation of Revenues

Records Management is funded vis internal service charges.

## Significant Program Changes

Last Year this program was: FY 2023: 78404 Records Management