

Priority: Accountability
Program Offer Type: Internal Service
Related Programs:

Lead Agency: County Management
Program Contact: Rich Swift

Program Characteristics:

Executive Summary

Records Management supports County agencies and the public in maintaining public records in accordance with operational, legal, fiscal, and public access needs.

Program Description

Records Management supports County programs in meeting public record requirements by developing and maintaining retention schedules for all County departments in a manner that meets public records legal requirements and departmental operational needs while lowering costs; maintaining over 106 million documents in a centralized Records Center; maintaining the County's historic archives dating back to 1855; recycling large volumes (65.5 tons in FY06) of public records in a manner that ensures confidentiality while supporting sustainability strategies; serving as health information Privacy Officer; and providing training, consultation, and guidance in electronic records keeping, document conversion, agency moves, complex public research and referral, records preservation, and records management best practices.

Program Justification

Records Management supports Accountability's primary factor of Resource Management through the strategy of helping to ensure that the County "manages its resources and service delivery costs effectively": (a) By reducing retention requirements whenever possible to lower records maintenance costs. For example, our retention research resulted in a one year drop in retention for medical case files, reducing annual storage needs for these records by 20% (560 boxes); (b) By centralizing records-keeping processes, economies of scale develop which have generated revenue from large scale recycling; saved \$36,000/year in payroll image conversion costs by using a more effective shared tool; and reduced the use of expensive office space (by 45,800 square feet in FY06) through use of lower cost warehouse space; (c) By maintaining extensive web tools and regular training to more effectively communicate to employees their public records obligations; (d) By removing barriers to public access through easy to use on-line guides to commonly sought public records and archival finding aids for access to the county's rich institutional memory; and (e) By protecting records from loss or obsolence, for example through grant funded records preservation projects for our historic archival holdings.

Performance Measures

Measure Type	Primary Measure	Previous Year Actual (FY05-06)	Current Year Purchased (FY06-07)	Current Year Estimate (FY06-07)	Next Year Offer (FY07-08)
Output	Retrievals, Refiles and Interfiles (Record Actions) Performed	15,480	16,400	15,400	15,000
Outcome	% Current Retention Schedules (updated within the last 5 years)	92.0%	85.0%	85.0%	90.0%
Output	Boxes, Microfilm Rolls, Maps and Plans Maintained in the Records Center	85,062	87,600	87,268	89,900
Quality	% of Record Retrievals Delivered to Customer Within 1 Business Day	96.0%	95.0%	99.0%	98.0%

Performance Measure - Description

 **Measure Changed**

% of Current Retention Schedules changed from % of County Programs Covered by Current Retention Schedules. Improves accuracy.

Legal/Contractual Obligation

ORS 192 and OAR 166 outline public records mandates for Records Officer, microfilm, imaging, storage, retention and access. 45 CFR 164.530(a) mandates Health Insurance Portability and Accountability Act (HIPAA) Privacy Officer, responsible for the privacy of personal health information (PHI). Executive Rule 301 assigns retention schedule function to program.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2007	2007	2008	2008
Personnel	\$0	\$324,217	\$0	\$334,411
Contracts	\$0	\$17,036	\$0	\$15,800
Materials & Supplies	\$0	\$11,039	\$0	\$17,746
Internal Services	\$0	\$240,579	\$0	\$278,368
Subtotal: Direct Exps:	\$0	\$592,871	\$0	\$646,325
Administration	\$4,072	\$23,890	\$4,805	\$23,611
Program Support	\$5,351	\$0	\$5,417	\$0
Subtotal: Other Exps:	\$9,423	\$23,890	\$10,222	\$23,611
Total GF/non-GF:	\$9,423	\$616,761	\$10,222	\$669,936
Program Total:	\$626,184		\$680,158	
Program FTE	0.00	4.00	0.00	4.00
Program Revenues				
Fees, Permits & Charges	\$0	\$627,944	\$0	\$677,937
Intergovernmental	\$0	\$2,952	\$0	\$10,427
Program Revenue for Admin	\$353	\$0	\$120	\$0
Total Revenue:	\$353	\$630,896	\$120	\$688,364

Explanation of Revenues

Records Management is funded by an allocation system through the Distribution Fund. Total program costs for FY08 are allocated based on each department's share of the number of boxes stored, boxes brought into the Records Center, and record actions performed in FY06.

Significant Program Changes

Last year this program was:

#72059 Records Section